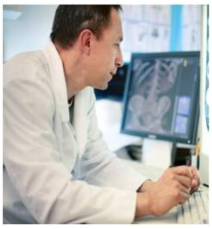
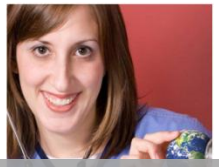
The Center for Educational Excellence

Promoting excellence in clinical care through healthcare provider, patient, and sponsor education around the world



Manage your own learning

Connect and Engage



Assess and Evaluate

COURSE ADMIN TRAINING

ETHOSCE COURSE SETUP WORKBOOK

Attest and Earn Credits

Print your own transcripts

Track and record attendance with your mobile phone

Introduction

This workbook is designed to support your participation in creating courses using Ethos CE. The EthosCE course admin training instructor-led training program uses this guide to capture “how-to’s” and useful best practice recommendations that are shared by your facilitator and classmates.

Getting Help

If you have any questions, or if you experience a technical problems that you are unable to resolve while using EthosCE, contact the DCRI Service Desk at 919.668.8916 or email **DCRI Service Desk** at dcriservicedesk@duke.edu.

Service Desk hours are Monday through Friday, 7 a.m. to 6 p.m. Eastern.

If you need emergency help outside normal operating hours, call the Service Desk at 919.668.8916 and leave a message that includes:

- Your name.
- Where and how you can be contacted.
- A brief description of your computer issue.
- The DCRI phone system immediately notifies the on-call support specialist, who will return your call as soon as possible.

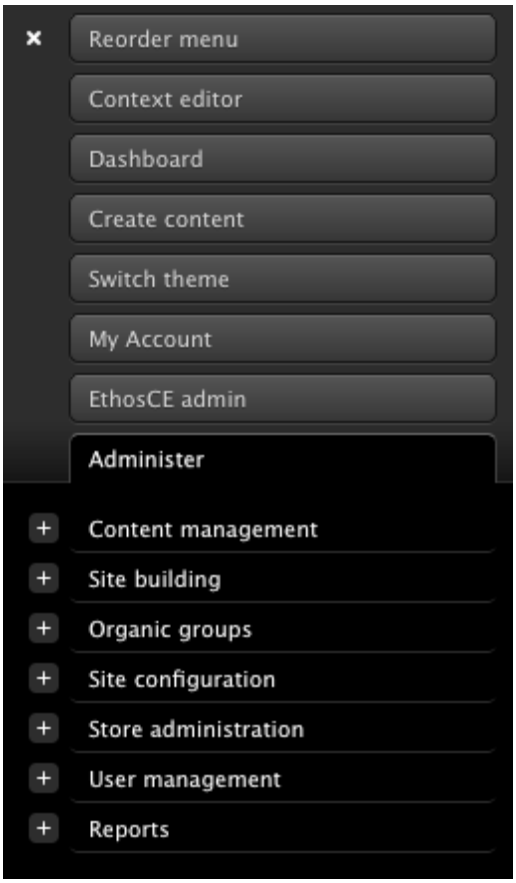
Logging into EthosCE

URL: http://continuingeducation.dcri.duke.edu

Click on **Join** (First time only) later to log in click **Log in**

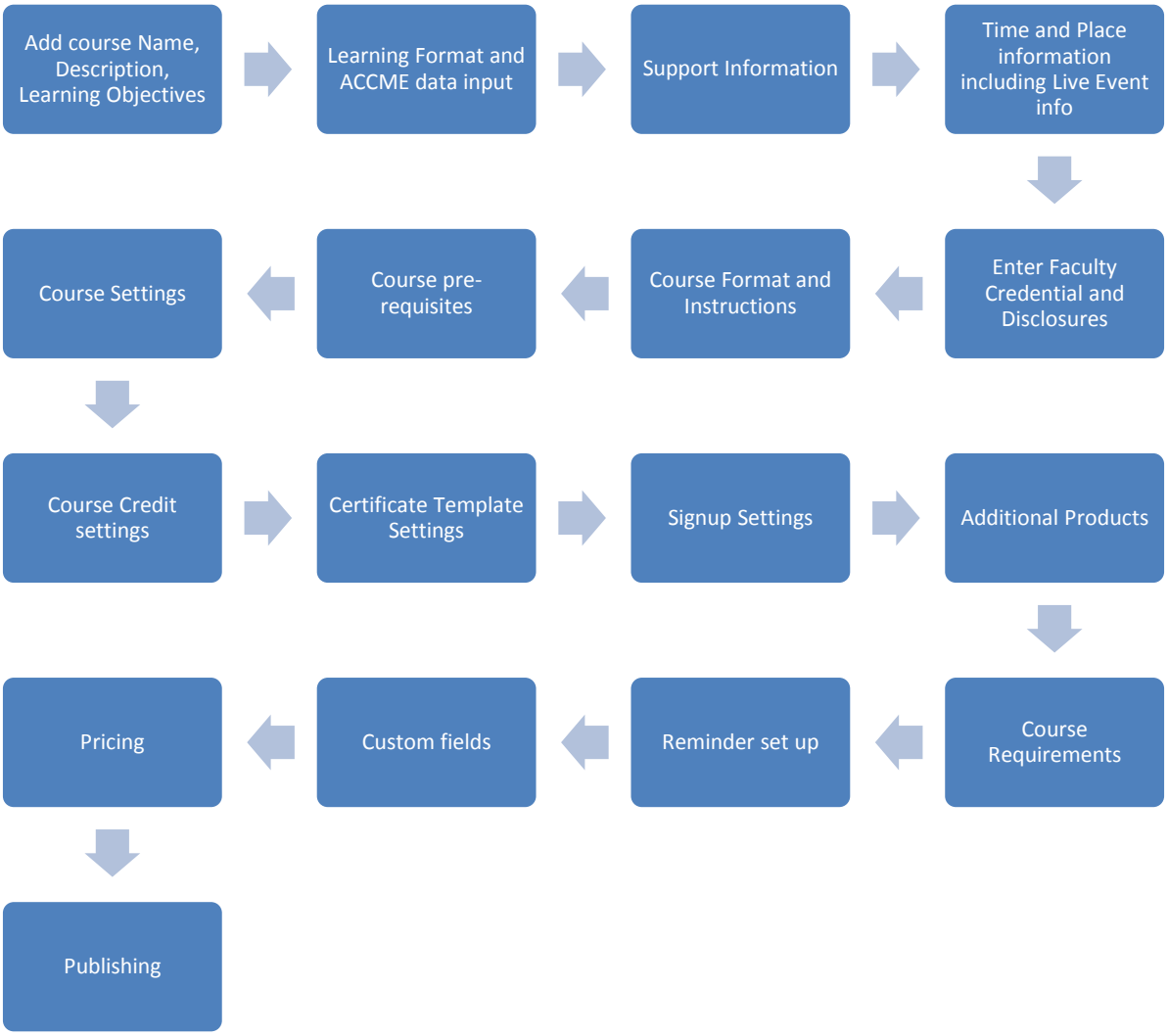
To access the admin menu, click on the icon towards the top left of your site. It will resemble a wrench.

When you click the icon, the admin menu will drop down.



To create your course in Ethos click on ***Create Content → Course***

Process flow for entering data to set up courses



Step-By-Step Instructions

Use this section to document step-by-step instructions.

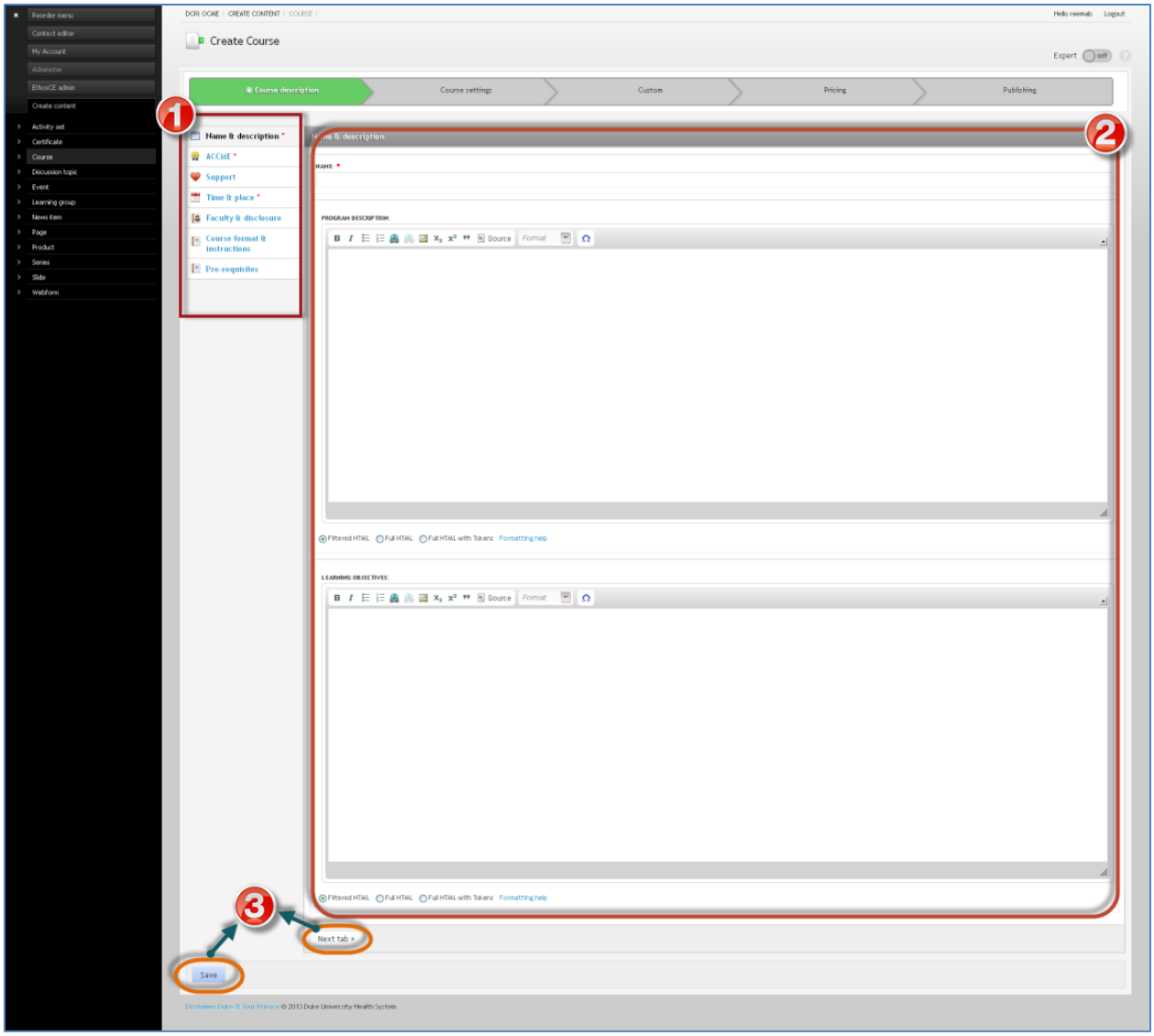
Notes

Use this section to capture personal notes and best practices.

Course Description

Name and Description

Enter in basic information for your course like the Title, Description. The description field supports HTML, but you must switch to full HTML mode to take advantage. To do so, click “Full HTML” at the bottom left of the description field.



Step-By-Step Instructions

Use this section to document step-by-step instructions.

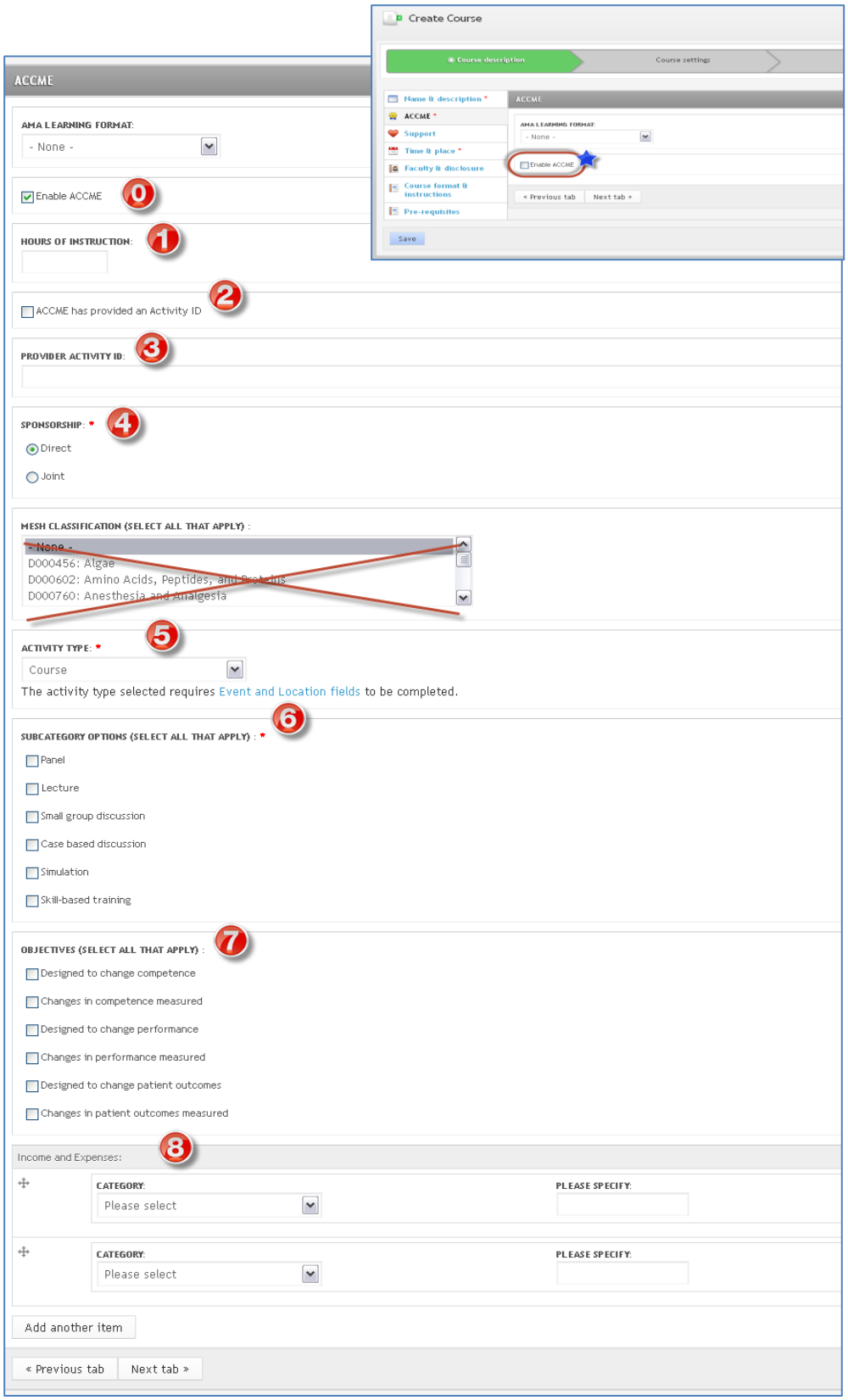
Notes

Use this section to capture personal notes and best practices.

ACCME

Enter ACCME fields if the course is a CME activity

Every activity must have only either a Provider Activity ID or an ACCME Activity ID.



Step-By-Step Instructions

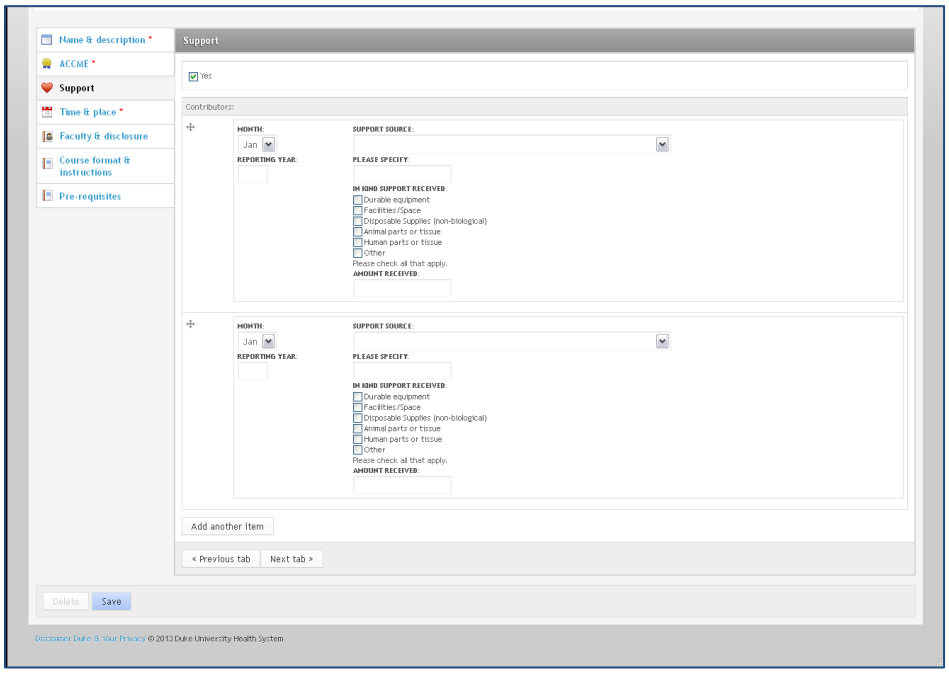
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Support

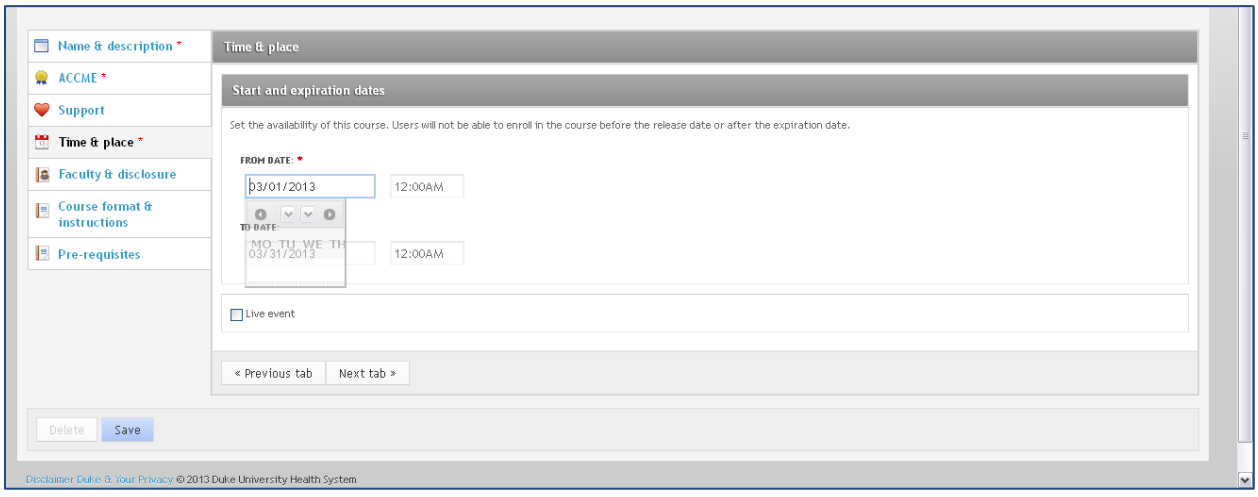
Enter Support received (if any)



Time and Place

Set the availability of your course. Users will not be able to enroll in the course before the release date or after the expiration date. To make a course Live, go to the Time & Place tab and check off the “Live Event” checkbox. More fields will drop down to fill in the dates and location.

If your course is a *live event*, users will not be able to enroll after the event has passed.



Step-By-Step Instructions

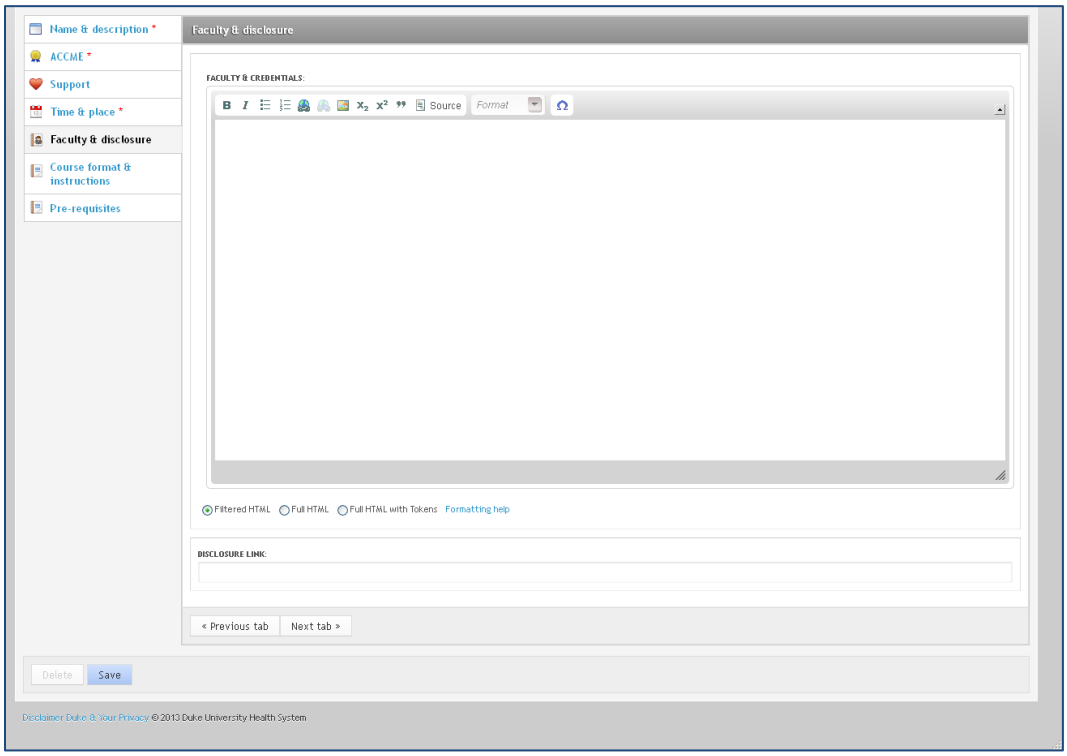
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

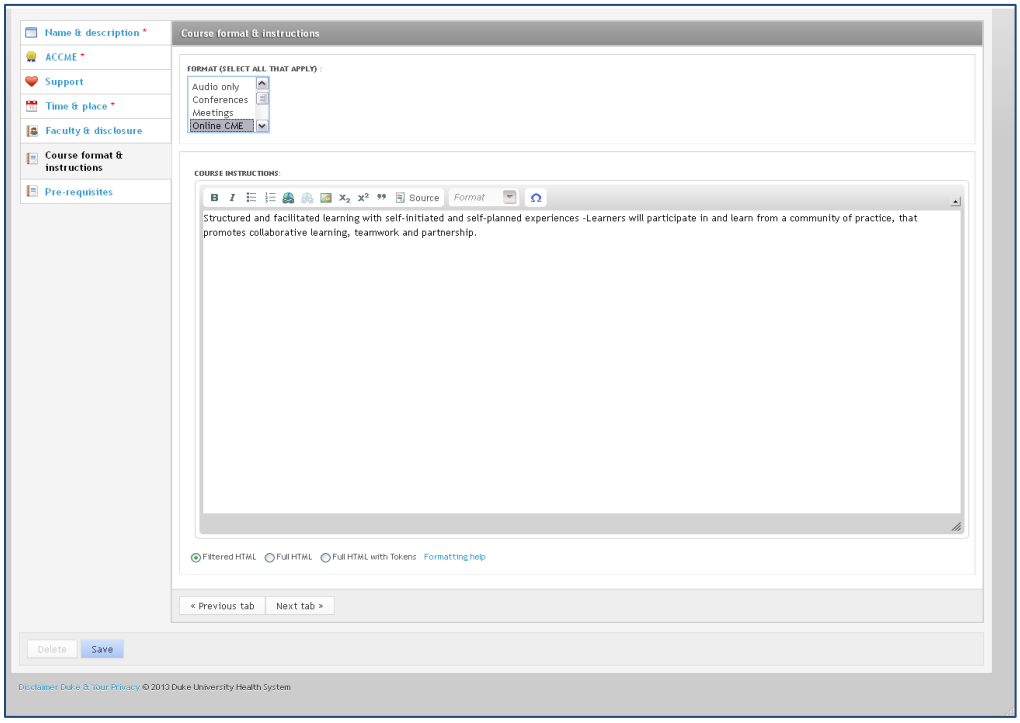
Faculty & Disclosure

Enter in Faculty & Credentials, as well as a link to Disclosures



Course Format and Instruction

Select your course format and type in course instructions. Course Instructions will appear when the user goes to take the course, above the course workflow



Step-By-Step Instructions

Use this section to document step-by-step instructions.

Notes

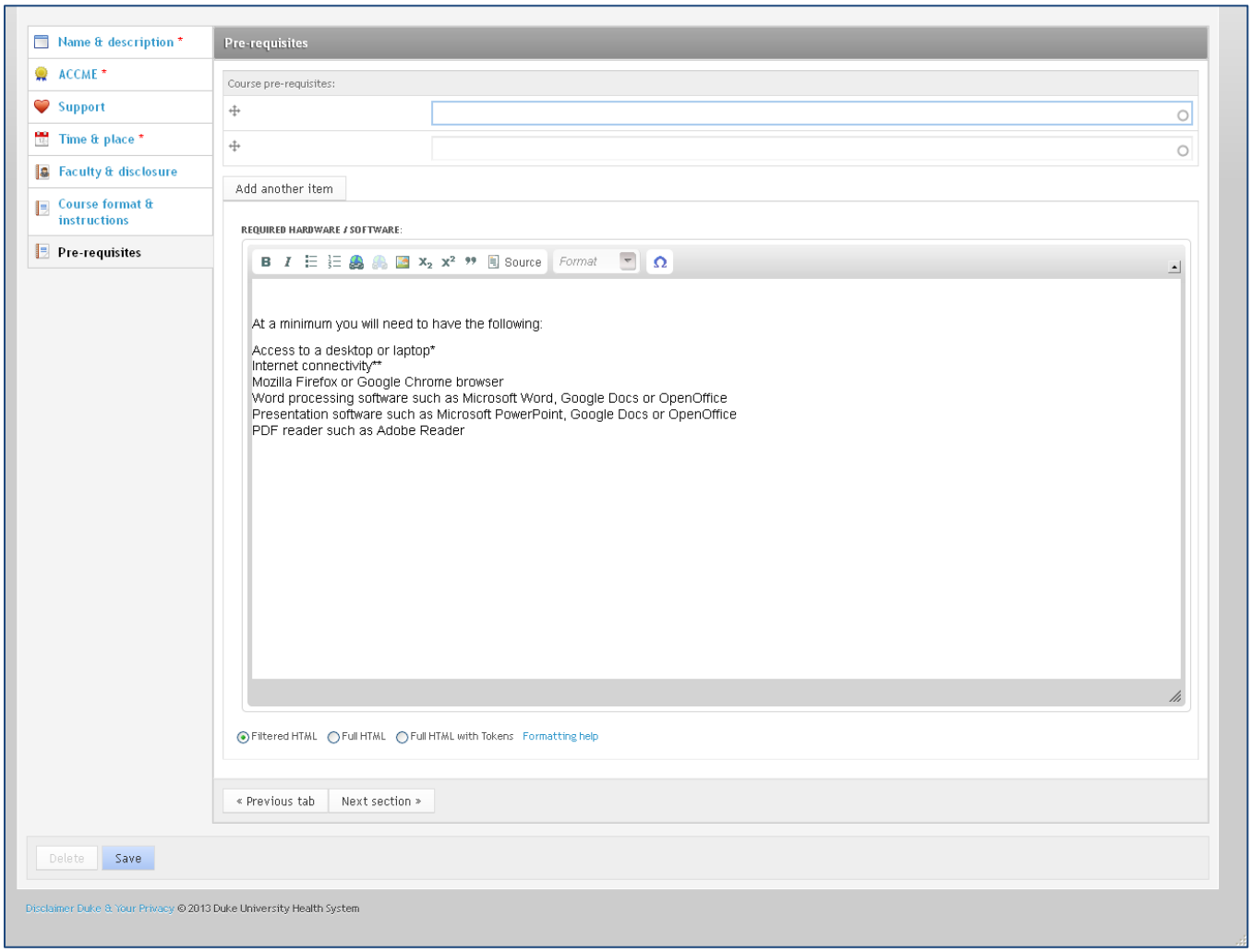
Use this section to capture personal notes and best practices.

Pre-requisites

You may set one or more courses as a prerequisite for enrollment. You must have courses already created to enter them as prerequisites.

Type in your Course prerequisites and re-order by dragging and dropping with the draggable tool. The order is only used for showing the user the list of prerequisites - the order is not enforced when enrolling in the prerequisites. Click on “Add another item” to add more prerequisites.

You may also enter in your Required Hardware/Software on this tab.



Step-By-Step Instructions

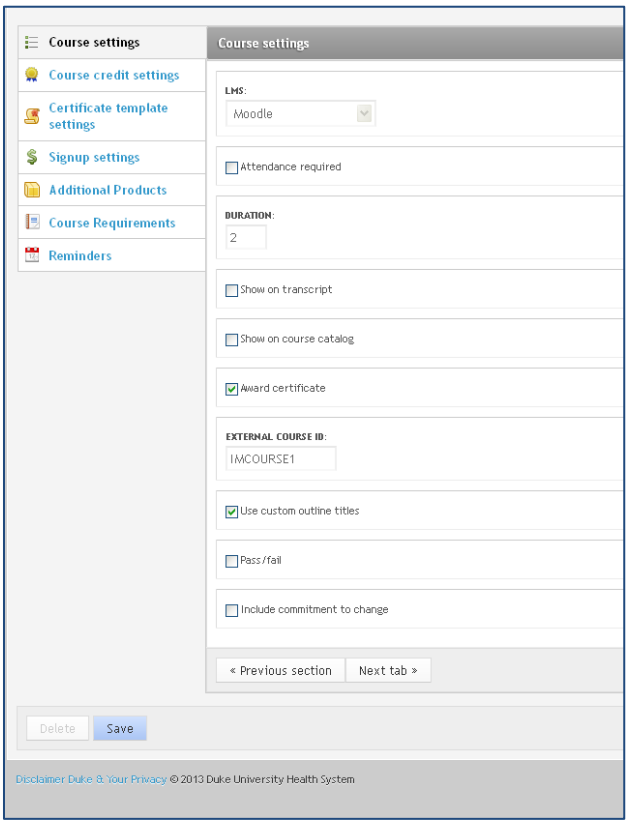
Use this section to document step-by-step instructions.

Notes

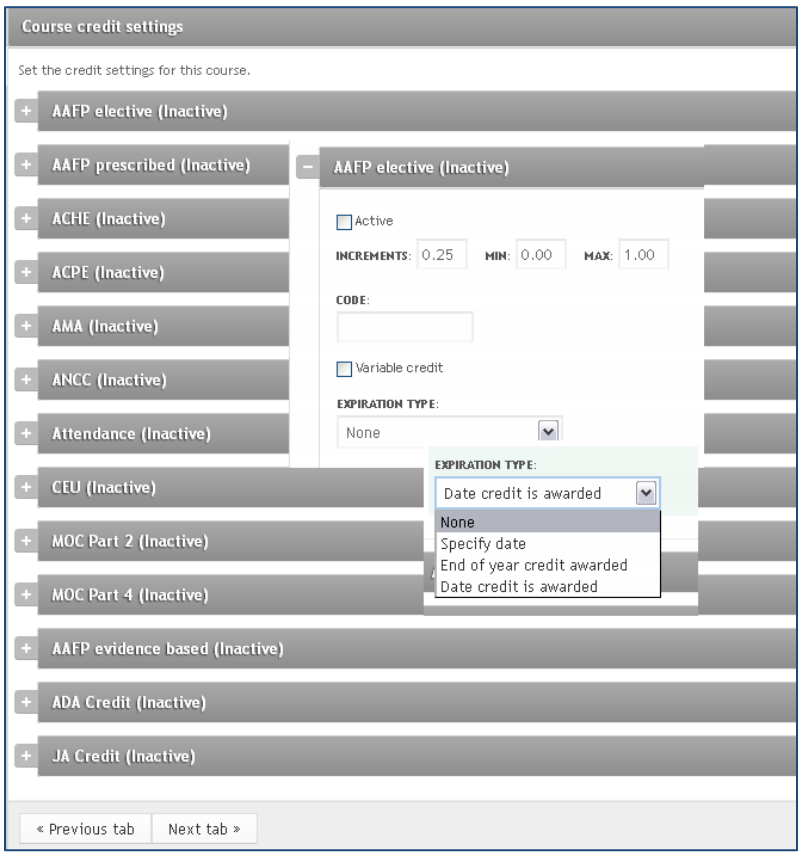
Use this section to capture personal notes and best practices.

Course Settings

Course Settings tab



- Check off “Attendance Required” if you want to restrict the learner from receiving a certificate or credit until they are marked attended.
- The Duration field is the length in days a user can remain in the course. Enter 0 for unlimited.
- Custom outline titles will allow you to name a course object using a custom name rather than the system defaults. (Creating course objects happens in the next section of this manual.)
- Pass/Fail should be enabled if you do not want to student to complete the course unless you manually set the Pass/Fail for the user. Please refer to the “Enrolling & Managing Enrolled Users” section of the manual for manually setting the completion status per user.



Course Credit Settings tab:

Note - Credit types in examples may be different from your site.

Click on the plus symbol (+) next to the credit to have the settings appear. You may change the minimum and maximum credits and the increments of credit (if variable credit is selected). To make the credit type active, check on the “Active” checkbox if it is not checked already.

Step-By-Step Instructions

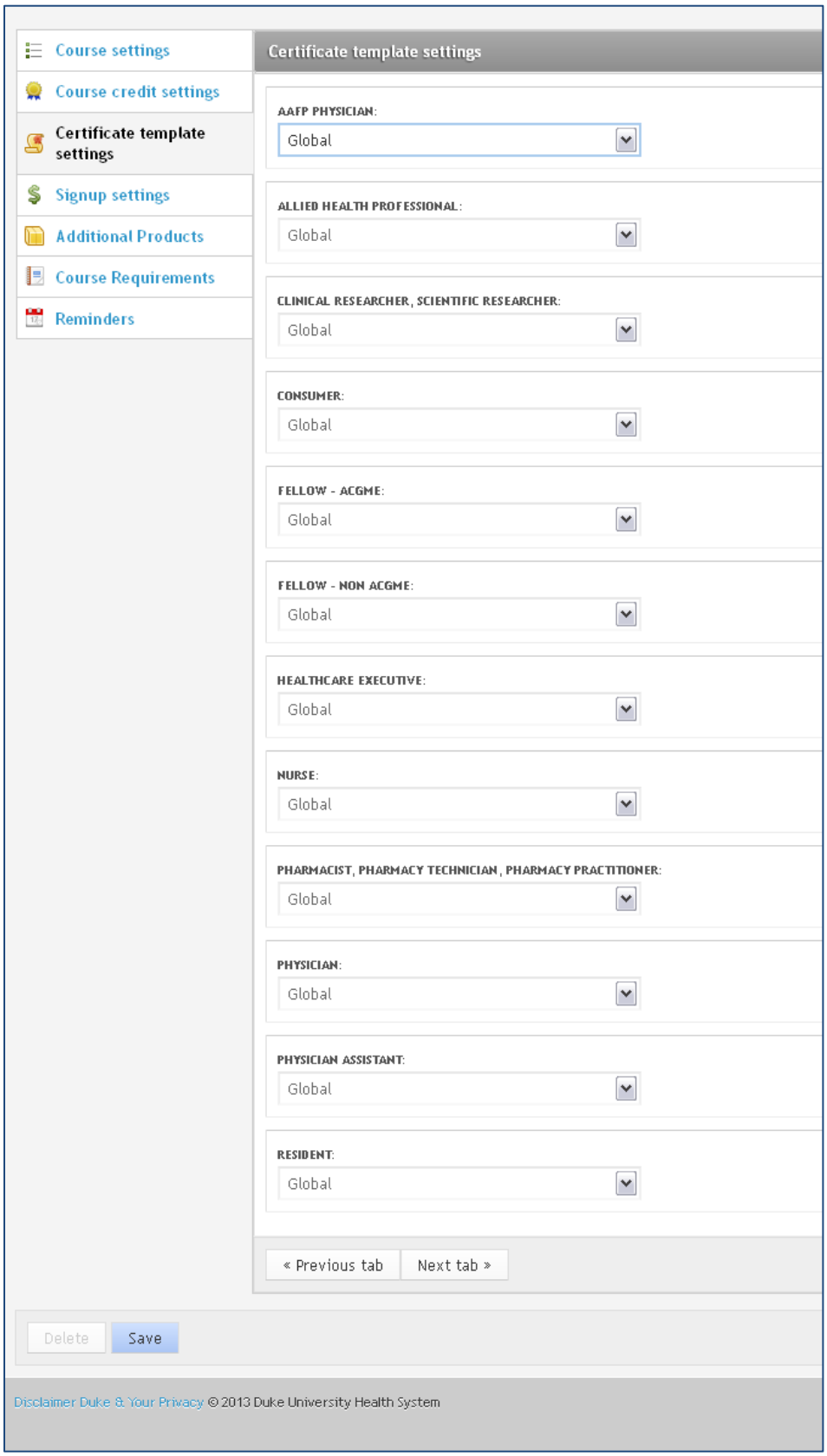
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Certificate Template Settings

You may set the certificate template per course. This will override the global defaults.



Step-By-Step Instructions

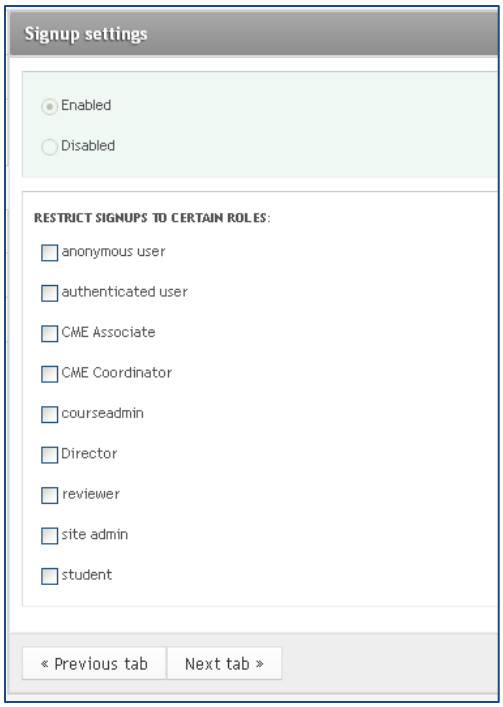
Use this section to document step-by-step instructions.

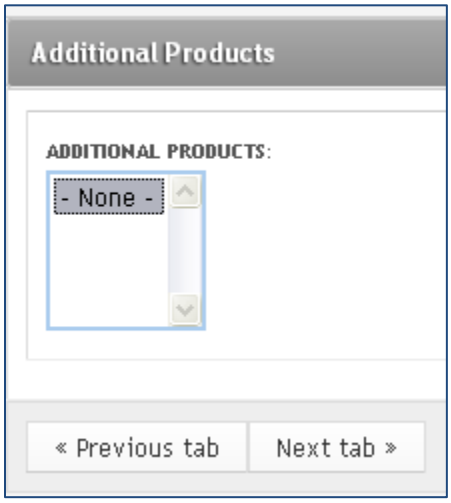
Notes

Use this section to capture personal notes and best practices.

Signup Settings

If you would like users to be able to sign up to the course from the site registration form, check off the “Users can sign up for this event from the user registration form” box.





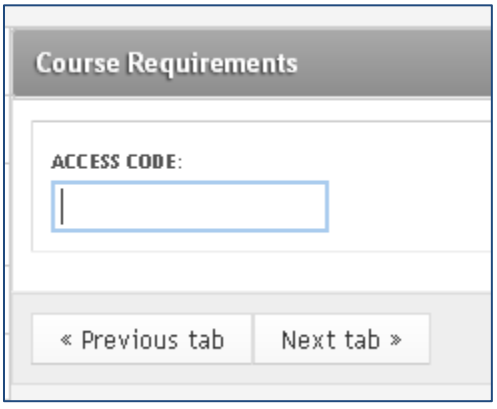
Additional Products

If the course contains any additional product that the learner can purchase you can add it from this TAB.

Note: The Products needs to be added in a under Create content → Product

Course Requirements

Enter an access code if you wish to restrict this course by use of a password.



Step-By-Step Instructions

Use this section to document step-by-step instructions.

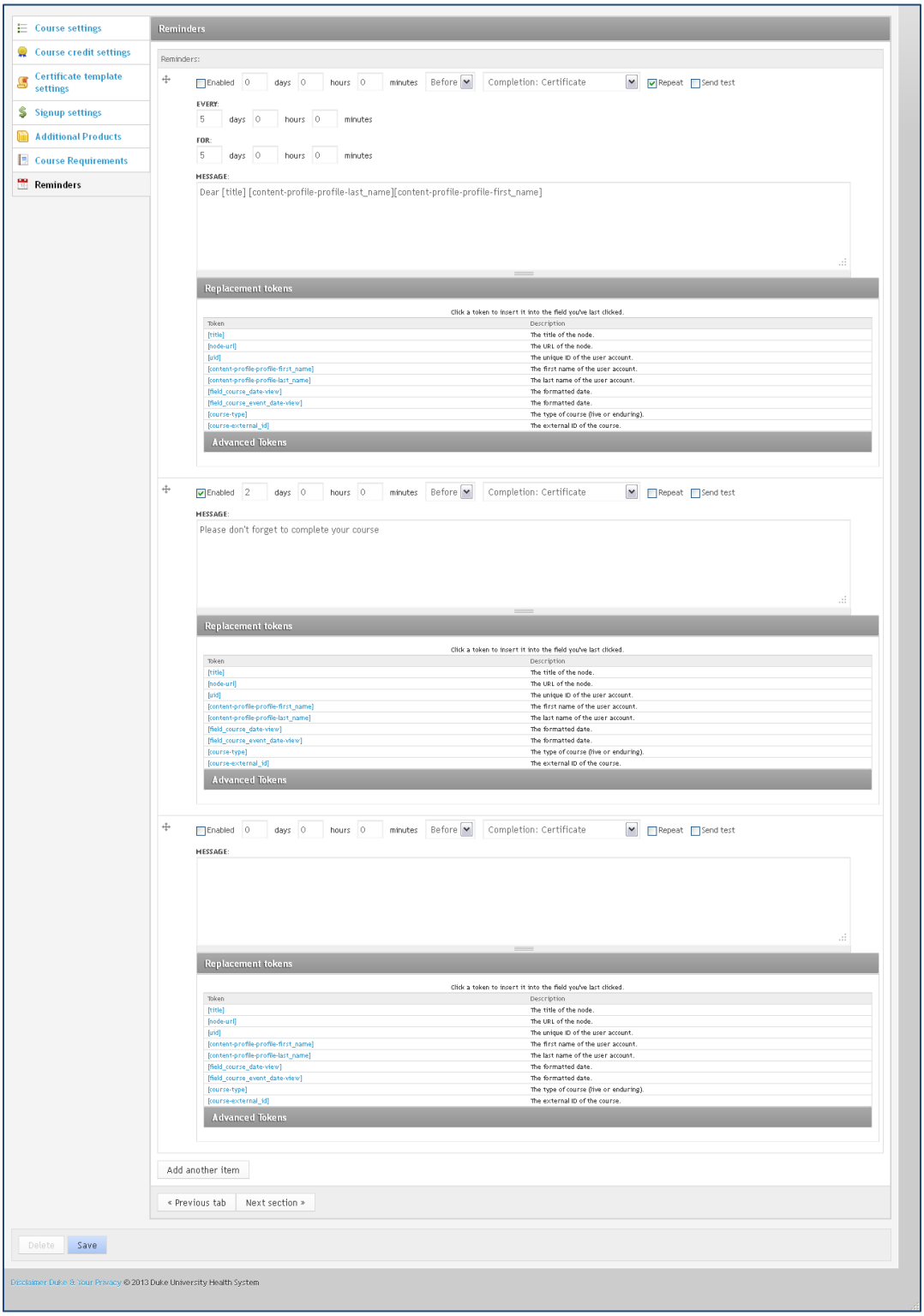
Notes

Use this section to capture personal notes and best practices.

Reminders

Here you can set a reminder that will be sent to the user a certain number of days before or after a certain point in course workflow. Reminder options are shown in the screenshot below. When you have added course objects, they will also appear in this list.

Check the “Enabled” checkbox to enable the reminder. Use the “commonly-used tokens” list to automatically insert user information into the email. You may have more than one reminder.


Course settings
Course credit settings
Certificate template settings
Signup settings
Additional Products
Course Requirements
Reminders
Reminders
Reminders:
Enabled 0 days 0 hours 0 minutes Before Completion: Certificate Repeat Send test
EVERY: 5 days 0 hours 0 minutes
FOR: 5 days 0 hours 0 minutes
MESSAGE:
Dear [title] [content-profile-profile-last_name][content-profile-profile-first_name]
Replacement tokens
Click a token to insert it into the field you've last clicked.
Token Description
[title] The title of the node.
[node-url] The URL of the node.
[uid] The unique ID of the user account.
[content-profile-profile-first_name] The first name of the user account.
[content-profile-profile-last_name] The last name of the user account.
[field_course_date-view] The formatted date.
[field_course_event_date-view] The formatted date.
[course-type] The type of course (live or enduring).
[course-external_id] The external ID of the course.
Advanced Tokens
Enabled 2 days 0 hours 0 minutes Before Completion: Certificate Repeat Send test
MESSAGE:
Please don't forget to complete your course
Replacement tokens
Click a token to insert it into the field you've last clicked.
Token Description
[title] The title of the node.
[node-url] The URL of the node.
[uid] The unique ID of the user account.
[content-profile-profile-first_name] The first name of the user account.
[content-profile-profile-last_name] The last name of the user account.
[field_course_date-view] The formatted date.
[field_course_event_date-view] The formatted date.
[course-type] The type of course (live or enduring).
[course-external_id] The external ID of the course.
Advanced Tokens
Enabled 0 days 0 hours 0 minutes Before Completion: Certificate Repeat Send test
MESSAGE:
Replacement tokens
Click a token to insert it into the field you've last clicked.
Token Description
[title] The title of the node.
[node-url] The URL of the node.
[uid] The unique ID of the user account.
[content-profile-profile-first_name] The first name of the user account.
[content-profile-profile-last_name] The last name of the user account.
[field_course_date-view] The formatted date.
[field_course_event_date-view] The formatted date.
[course-type] The type of course (live or enduring).
[course-external_id] The external ID of the course.
Advanced Tokens
Add another item
« Previous tab
Next section »
Delete
Save
Disclaimer Duke & Your Privacy © 2013 Duke University Health System

Step-By-Step Instructions

Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Custom Fields

- Enter Specialty
- Enter Sub-Subspecialty
- Number of Sessions
- Target Audience
- Activity Director
- Scope
- Alignment
- Competencies
- Barriers
- Format
- Non-Educational Strategies
- Practice Gaps
- QA/QI
- Outcomes

Step-By-Step Instructions

Use this section to document step-by-step instructions.

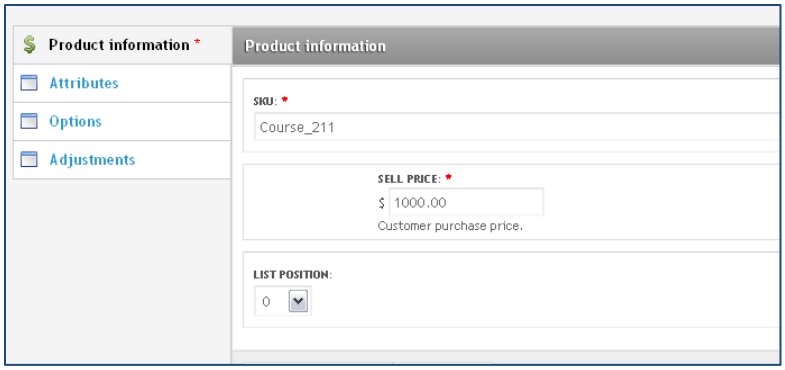
Notes

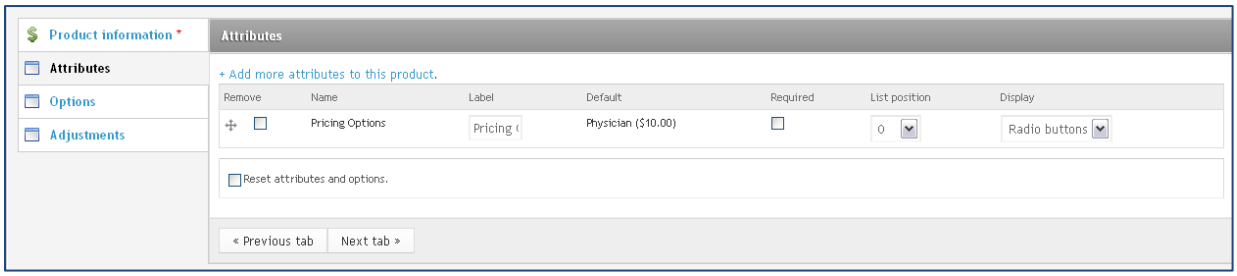
Use this section to capture personal notes and best practices.

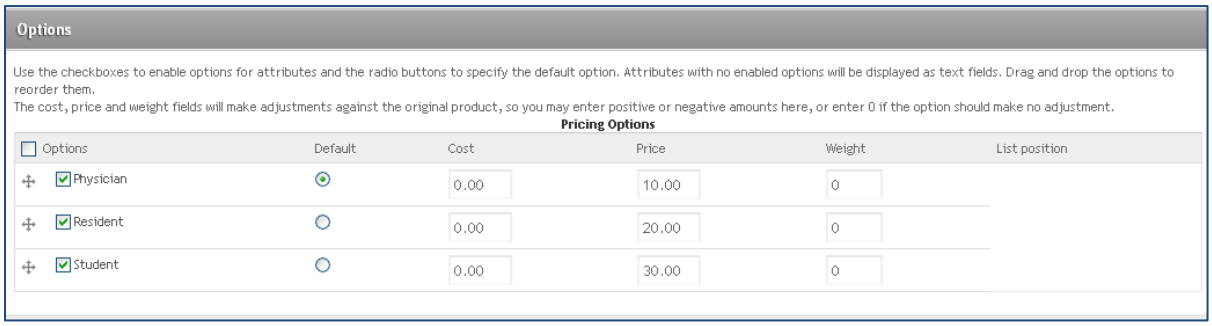
Pricing

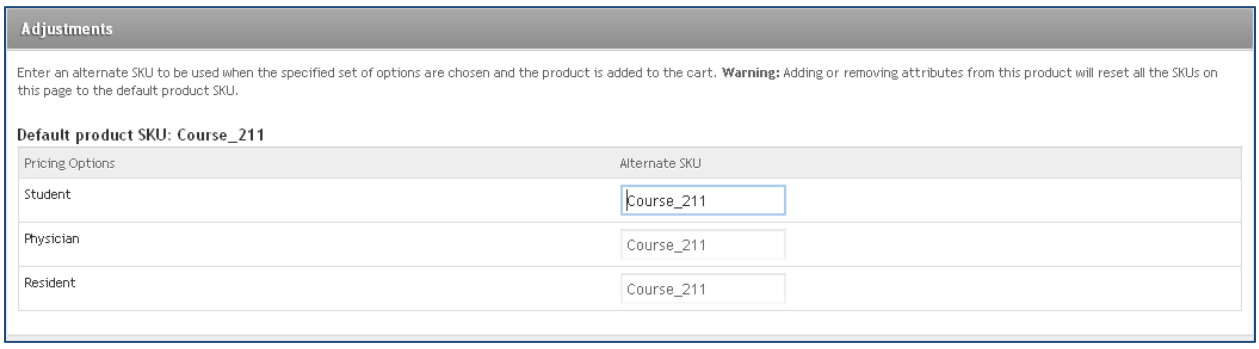
Product Information

You can set role-based pricing under the “Product Information” tab. The Default Sell price is the nonmember price, and the Member Price is where you enter the member price. You can leave the member priceempty if there is no member price.






Options
Use the checkboxes to enable options for attributes and the radio buttons to specify the default option. Attributes with no enabled options will be displayed as text fields. Drag and drop the options to reorder them.
The cost, price and weight fields will make adjustments against the original product, so you may enter positive or negative amounts here, or enter 0 if the option should make no adjustment.
Pricing Options
Options
Default
Cost
Price
Weight
List position
Physician
0.00
10.00
0
Resident
0.00
20.00
0
Student
0.00
30.00
0


Adjustments
Enter an alternate SKU to be used when the specified set of options are chosen and the product is added to the cart. Warning: Adding or removing attributes from this product will reset all the SKUs on this page to the default product SKU.
Default product SKU: Course_211
Pricing Options
Alternate SKU
Student
Course_211
Physician
Course_211
Resident
Course_211

Step-By-Step Instructions

Use this section to document step-by-step instructions.

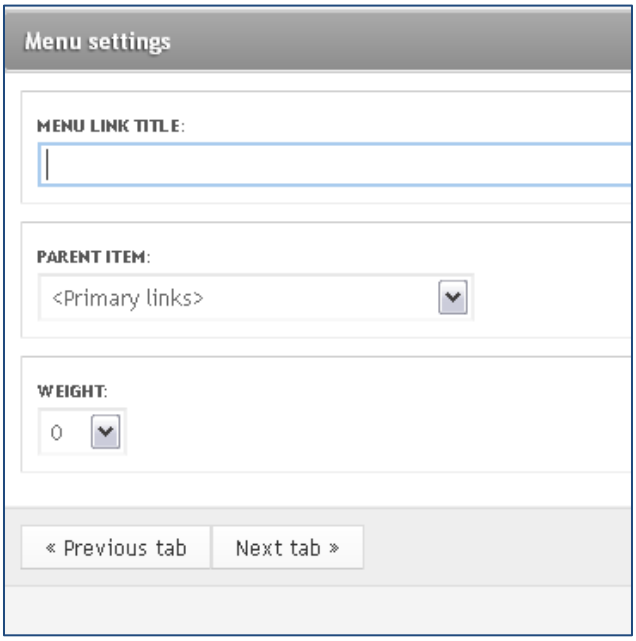
Notes

Use this section to capture personal notes and best practices.

Publishing

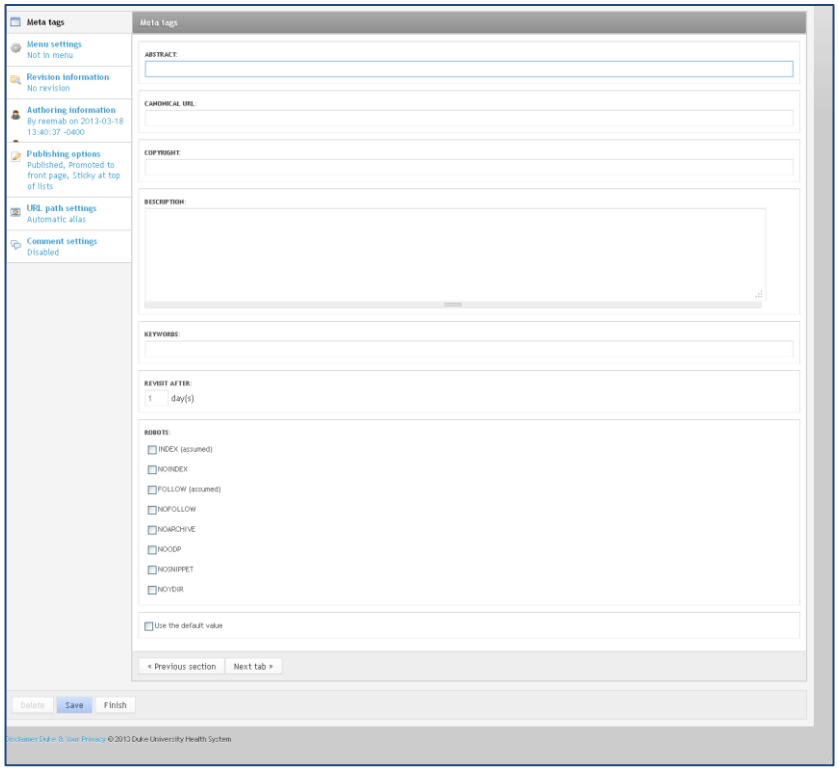
Meta tags:

Add your course meta tags like Abstract, Copyright, Description, Keyword



Menu Settings:

Add your course to the menu by giving your course a Menu Link Title. You can sort the menu item in Parent Item dropdown, or by weight



Step-By-Step Instructions

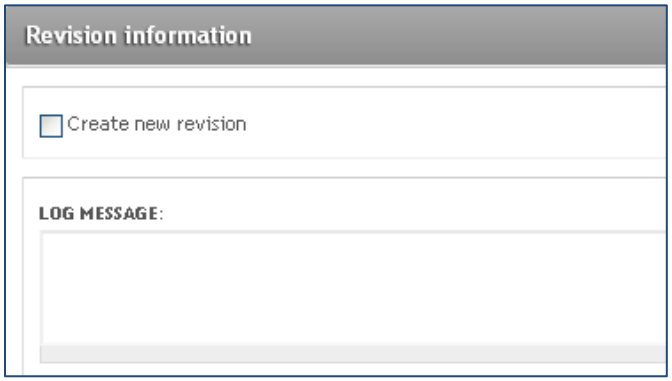
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

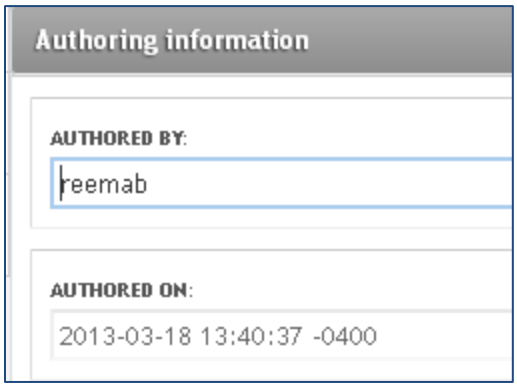
Revision Information

Enable revisions if you would like revisions to be saved every time you make a change to the course. You can revert back to a revision if need be.



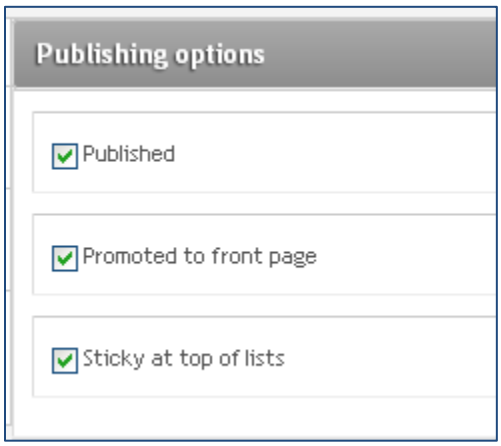
Authoring Information

Enter in who the course was authored by, and on what date. These fields pre-populate with information, but you may change them



Publishing Option

Check the “Published” checkbox if you would like the course to be published. Uncheck if you would like the course to be unpublished. Users will not be able to access the course if it is unpublished.



Step-By-Step Instructions

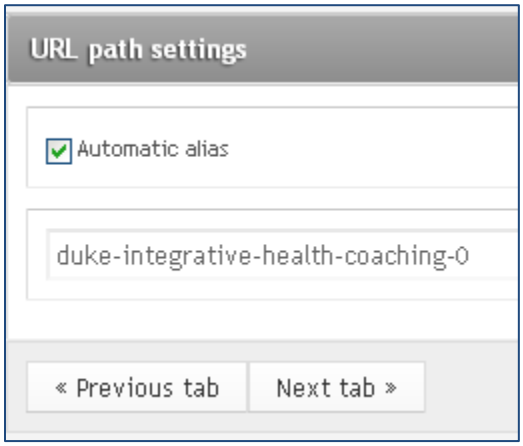
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

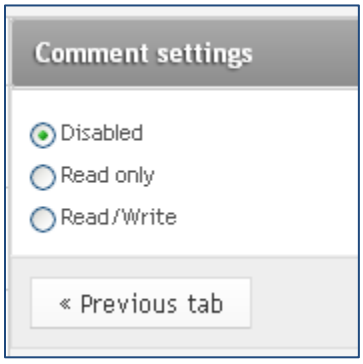
URL Path Settings

Change the URL path setting, if you would like to change the automatic alias that is populated from the course title.



Comment Settings

By default, comments are disabled, but you can enable them so that uses will be able to comment on the course landing page.



Step-By-Step Instructions

Use this section to document step-by-step instructions.

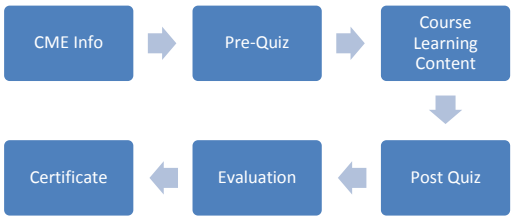
Notes

Use this section to capture personal notes and best practices.

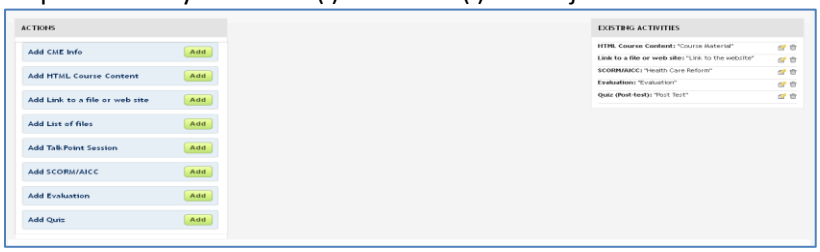
Creating Course Objects

This section contains instructions on how to create course objects for your course. You will be working mostly on the "Course Objects" page. From this page you will add different elements to your course that the learner will complete to earn credit.

A typical workflow for a course is: CME Info, Pre-quiz, Course, Post-quiz, Evaluation, and Certificate.



Step 1: Navigate to the course you would like to add your course objects to, and click on the "Course objects" tab.
Step 2: To add objects to your course, click on the Add button next to the object you would like to add.
Step 3: After filling the required information and saving, the object will then move over from the "Actions" column to the "Existing Activities" column.
Step 4: You may then edit ( ) or delete ( ) the object.



At the bottom of the page, you will see a preview panel of the course objects. This represents the learner view of the course workflow. The custom outline titles will appear if you enabled "Use custom outline titles" when creating your course shell (under Course Settings section and tab). Otherwise, the default titles will display.

Course Objects reflect if the object is ***Optional*** (learner may skip), ***Required*** (learner cannot skip), ***Completed*** (green checkmark), or ***Locked*** (will be unlocked when user completes required objects). You can set the requirements through the **CERTIFICATE REQUIREMENTS TAB** of your course.

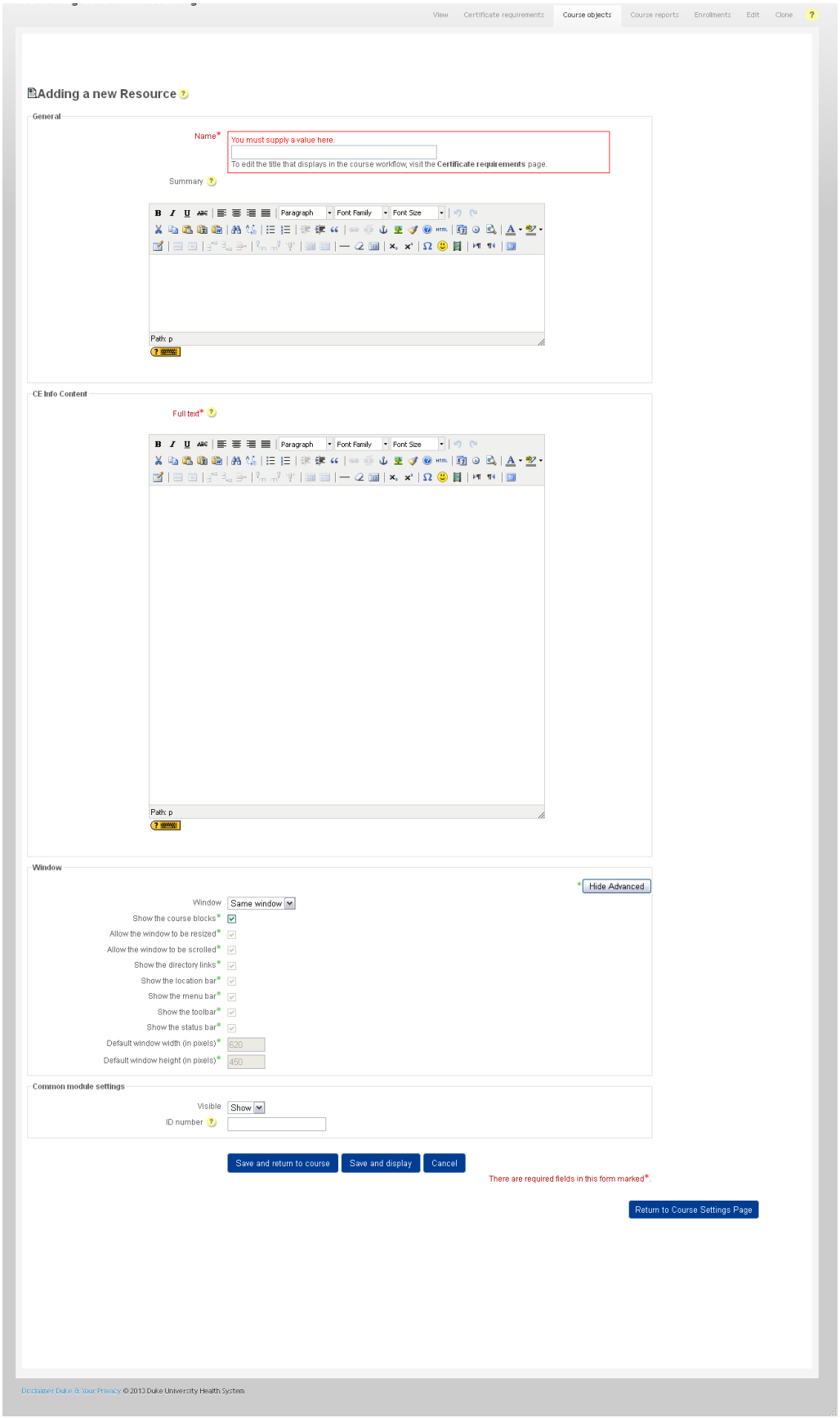
Step-By-Step Instructions

Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add CME info


View
Certificate requirements
Course objects
Course reports
Enrollments
Edit
Clone
Adding a new Resource
General
Name*
You must supply a value here.
To edit the title that displays in the course workflow, visit the Certificate requirements page.
Summary
Paragraph
Font Family
Font Size
Path: p
CE Info Content
Full text*
Path: p
Window
Hide Advanced
Window
Same window
Show the course blocks*
Allow the window to be resized*
Allow the window to be scrolled*
Show the directory links*
Show the location bar*
Show the menu bar*
Show the toolbar*
Show the status bar*
Default window width (in pixels)*
620
Default window height (in pixels)*
450
Common module settings
Visible
Show
ID number
Save and return to course
Save and display
Cancel
There are required fields in this form marked*.
Return to Course Settings Page
Disclaimer Duke & Your Privacy © 2013 Duke University Health System

Step-By-Step Instructions

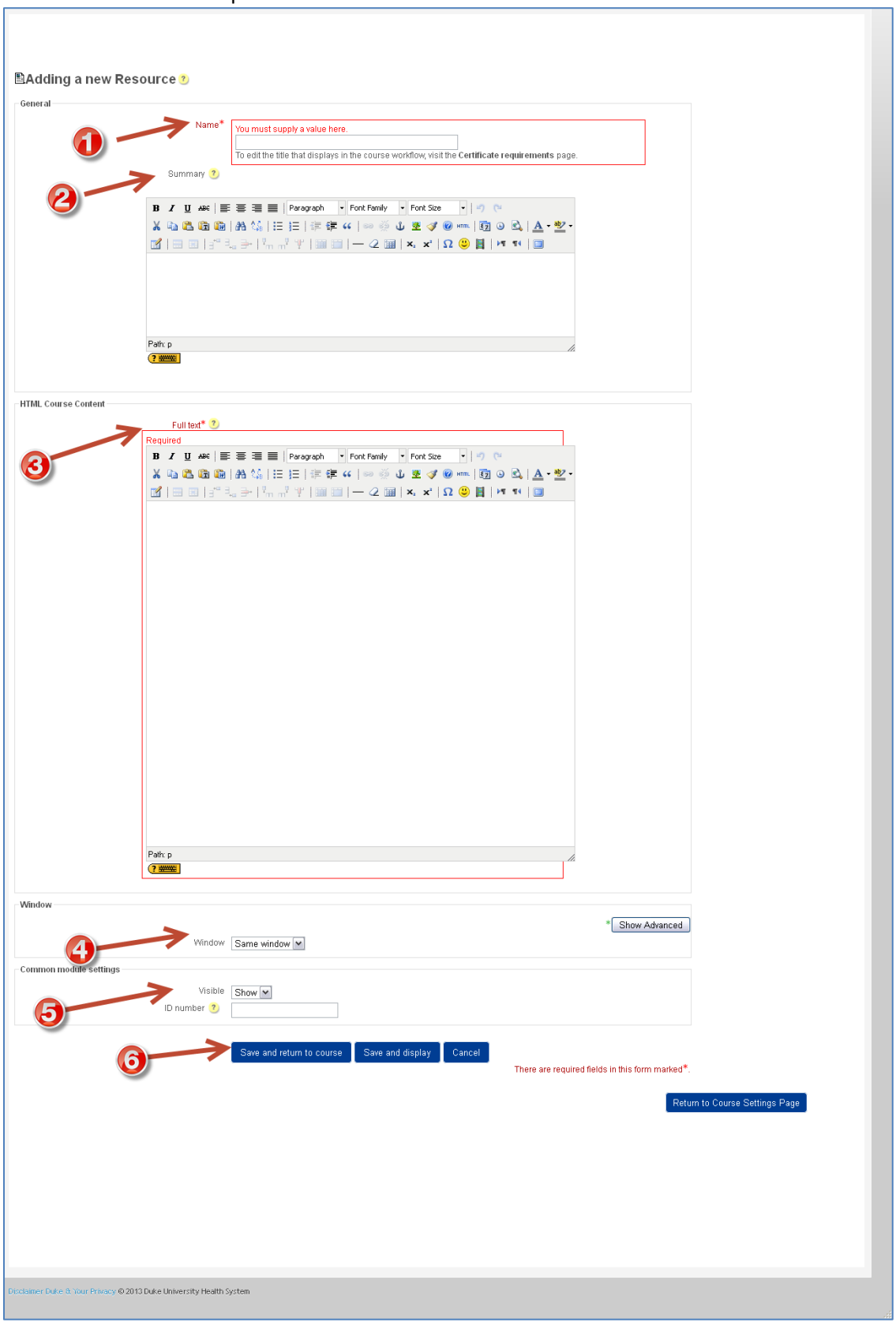
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add HTML Course Content

Step 1: Click “Add HTML Course” under "Actions" to add it to your course.
Step 2: Enter the Name, Summary, and Full text into their respective fields. Name and Full text is required.



Step-By-Step Instructions

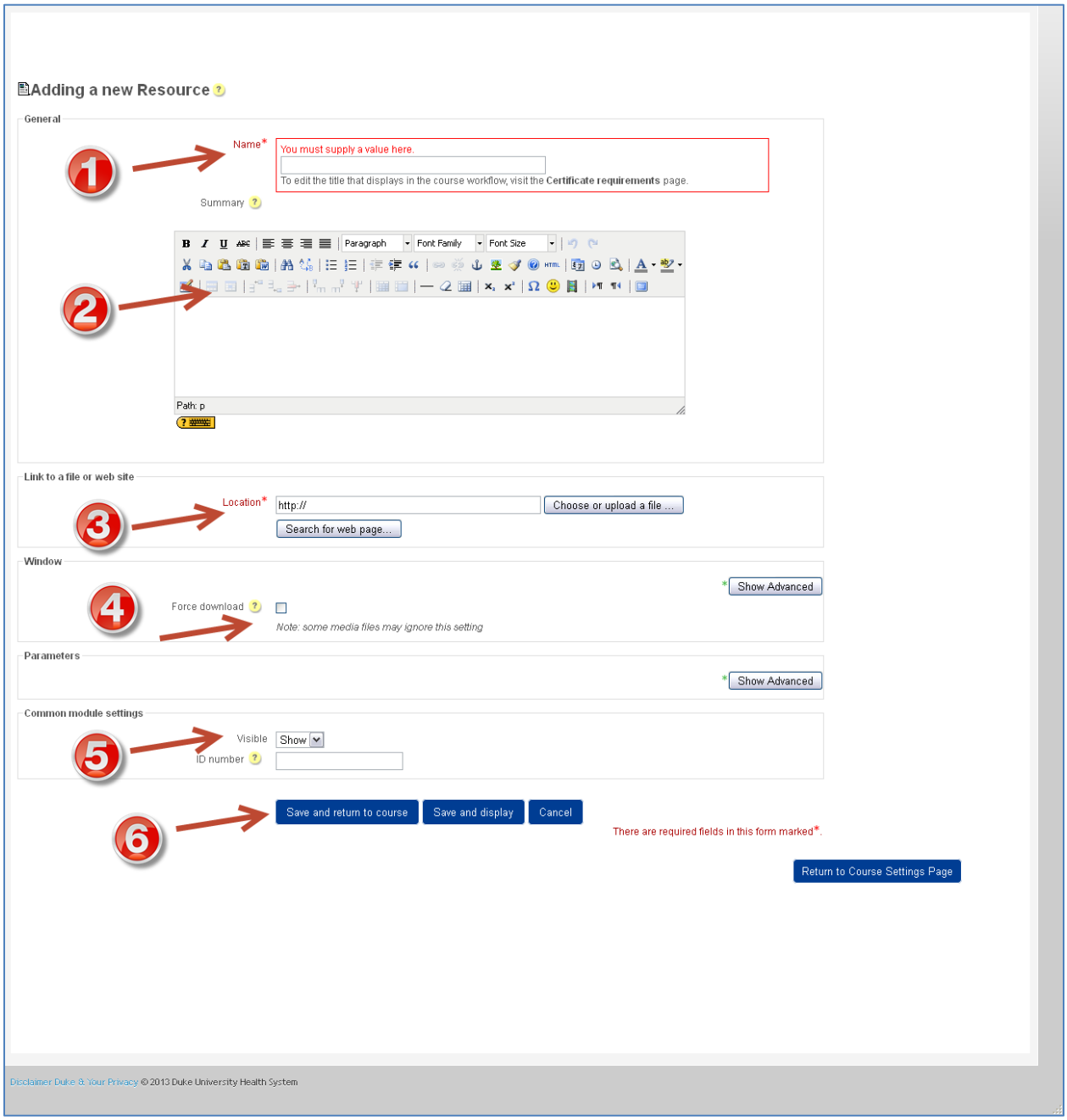
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add Link to a File or Website

Add any link or file. You can also use this option to Add a Camtasia Package /Articulate or multi-file presentation package to a course



Step-By-Step Instructions

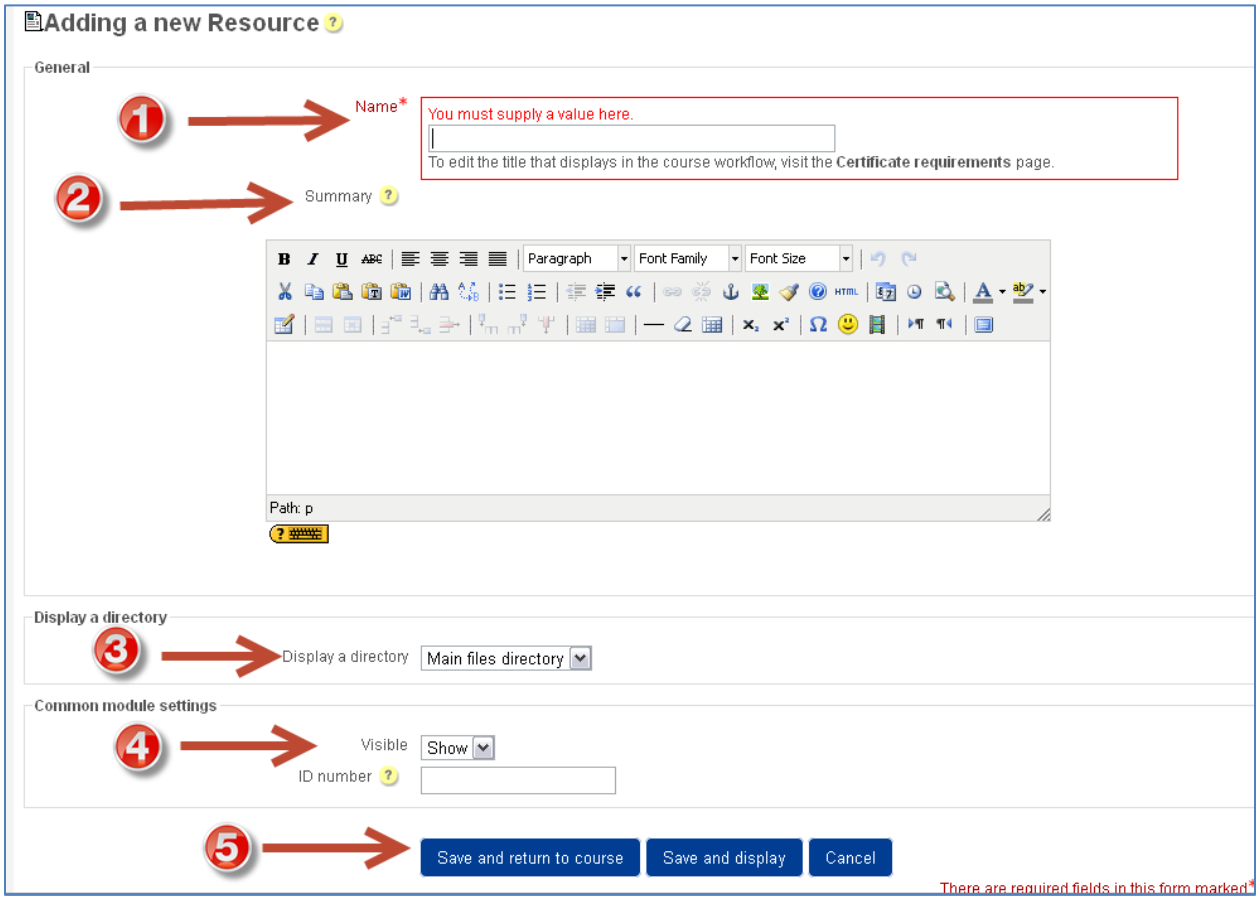
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add a list of files

If you would like to display a list of files from the server for the user's view (a list of PDFs, for example), this would be the course object to use.



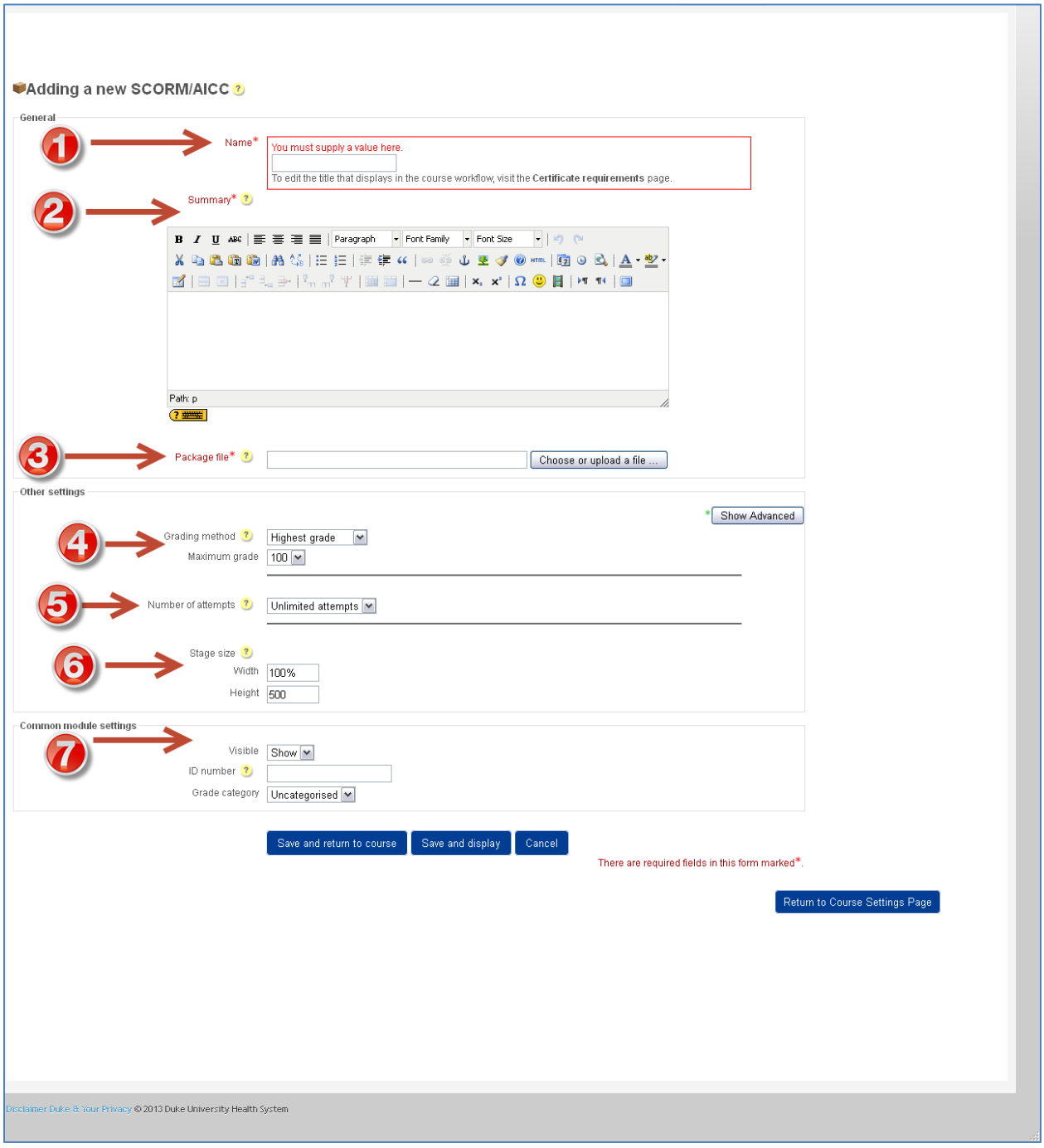
Step-By-Step Instructions

Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Adding a new SCORM/AICC



Step-By-Step Instructions

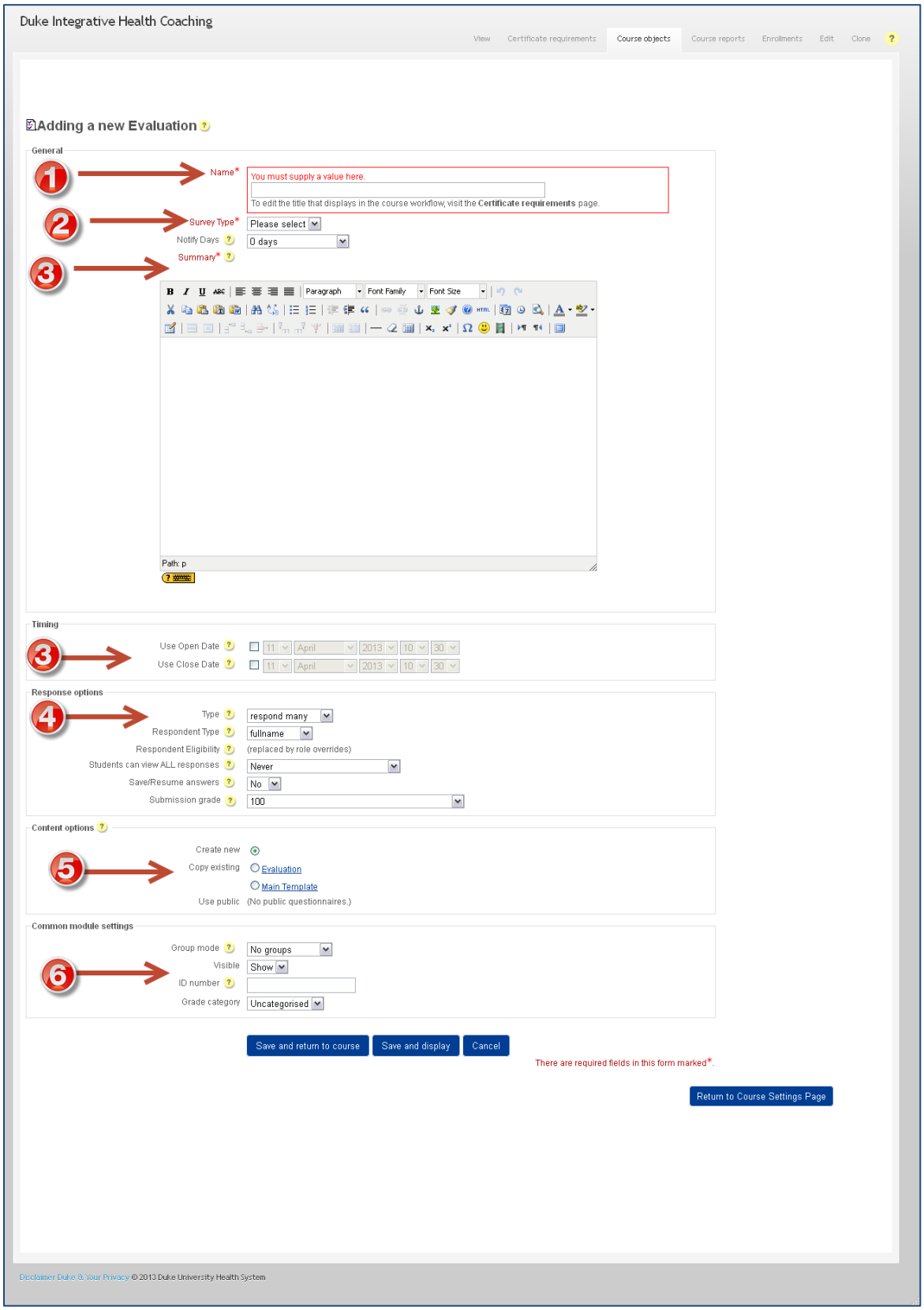
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add Evaluation

[Refer to user manual pg. 72-75]



Step-By-Step Instructions

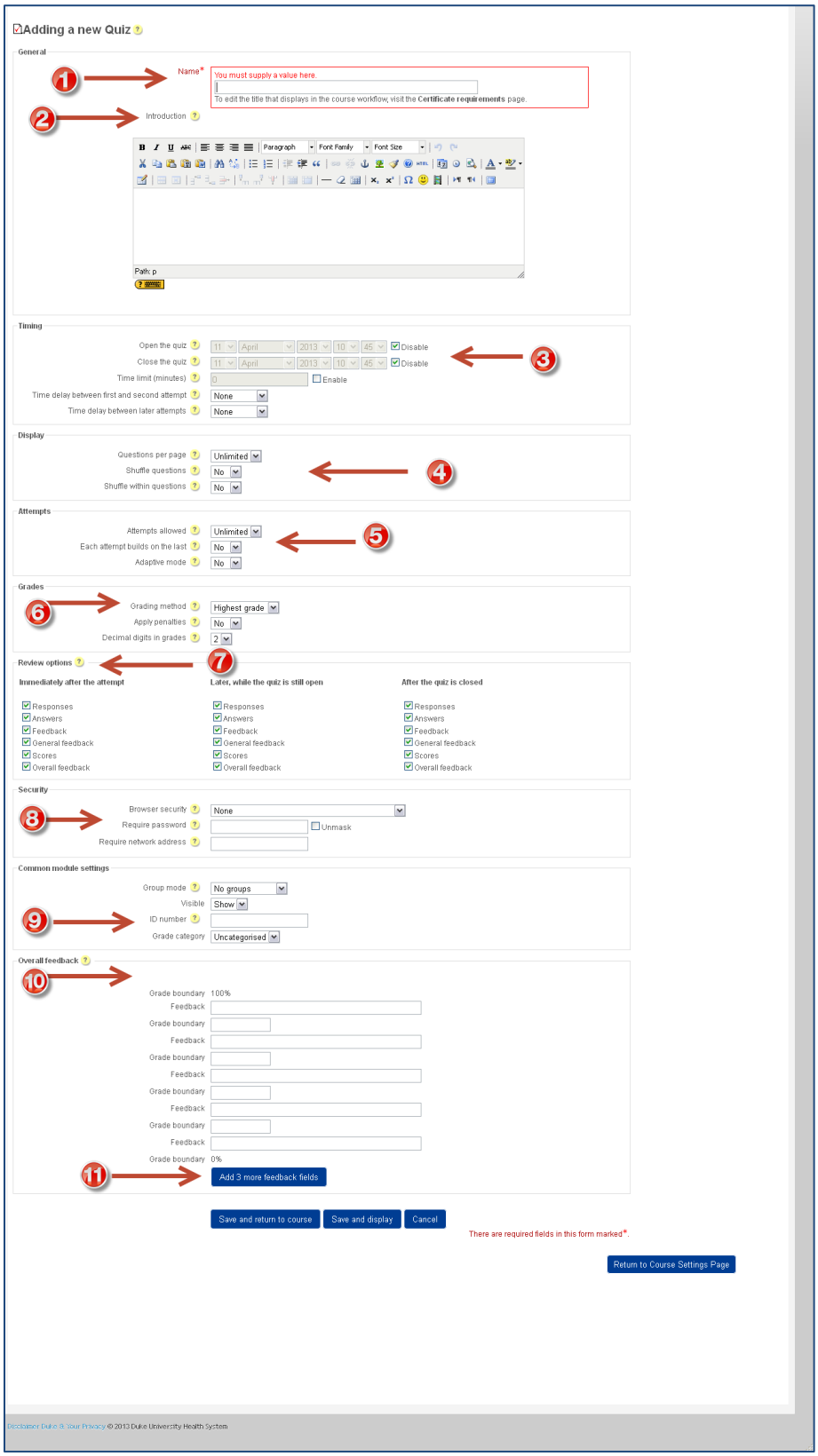
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Add Quiz

[PLEASE REFER TO USER MANUAL PAGE 67 – 73]



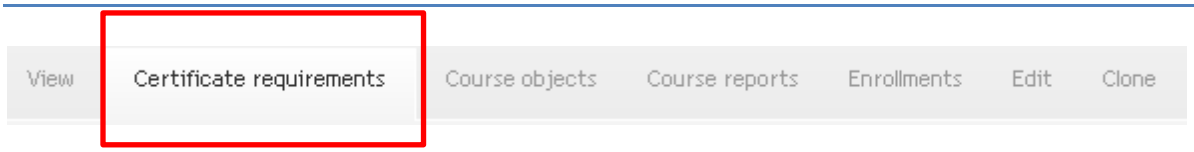
Step-By-Step Instructions

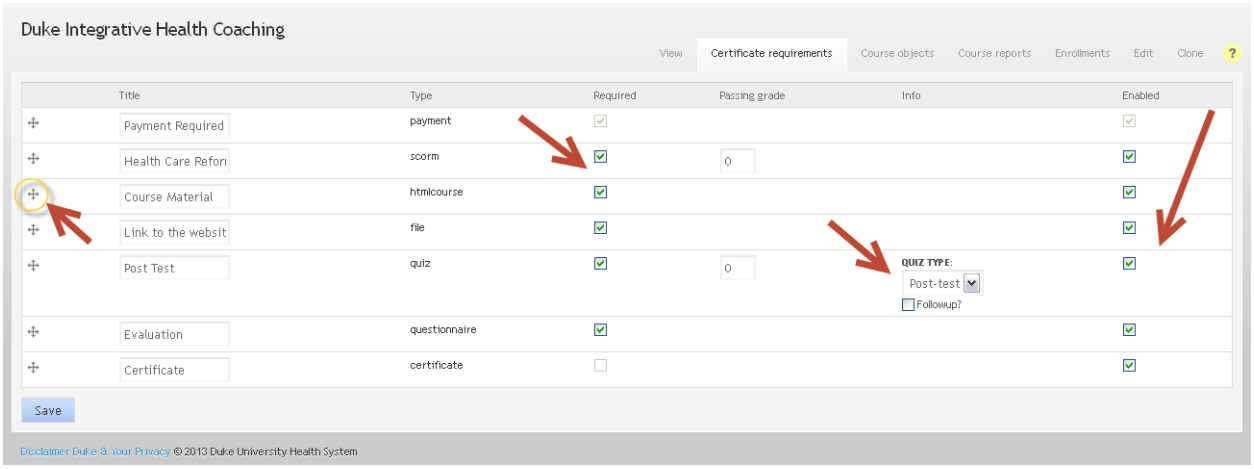
Use this section to document step-by-step instructions.

Notes

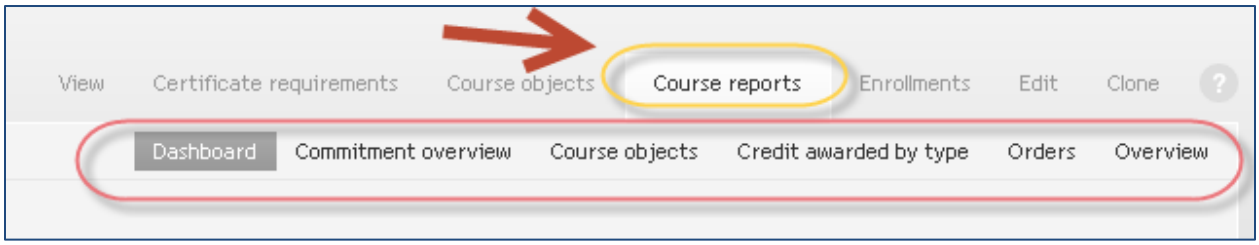
Use this section to capture personal notes and best practices.

Certificate Requirement





Course Reports



FOR MORE INFORMATION REFER TO USER MANUAL PAGE 93- 102

Step-By-Step Instructions

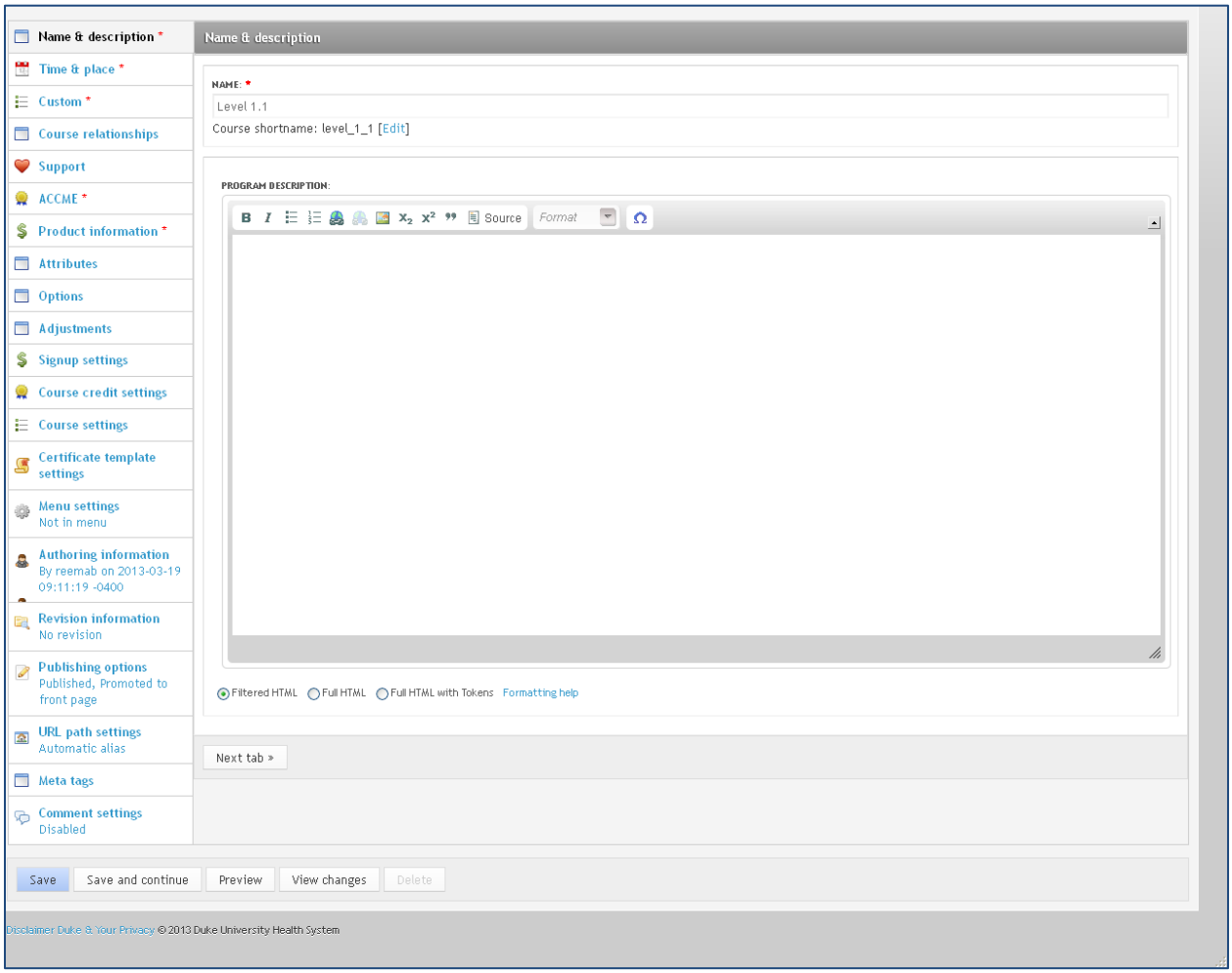
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Activity Sets

- Activity sets consists of a parent course with one or more child courses that allows flexibility when building a course.
- Once grouped, additional features for those activities become available. You can build number of credits and certificates for each child course or a single certificate and credit for the entire activity set.
- Assessment, evaluation, purchasing, discount can be built to each course or to the entire activity set
- Allow users to claim immediate credit.
- Allow for credit to be aggregated from children and activity sets



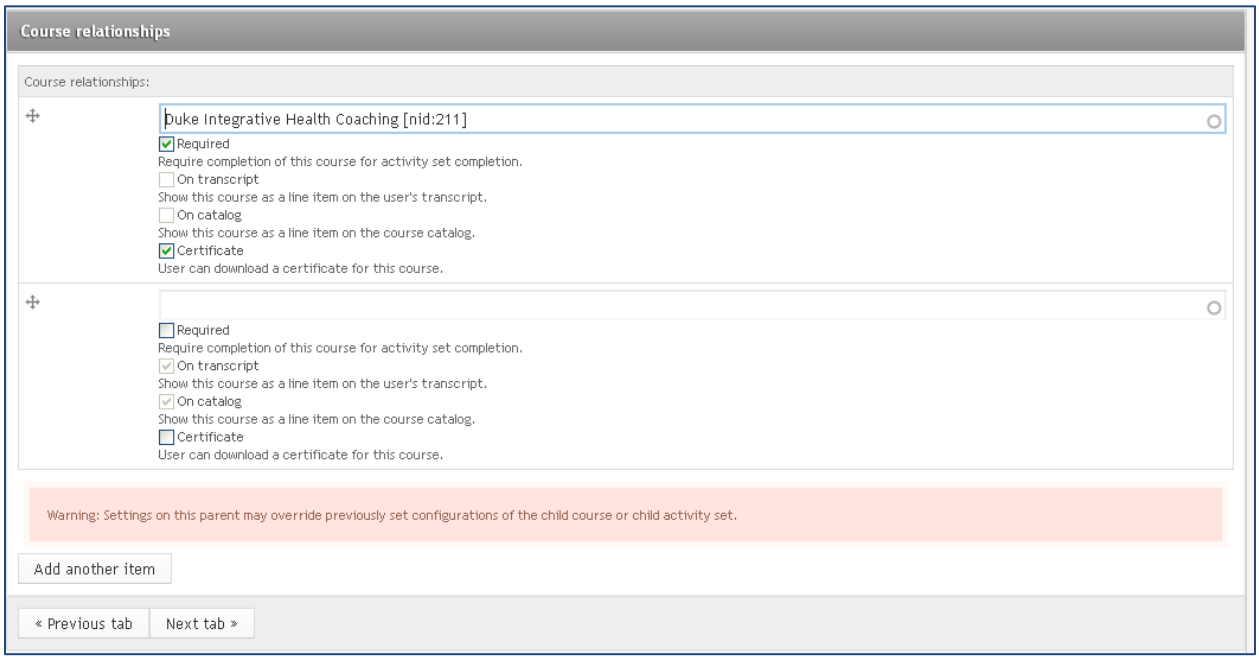
Step-By-Step Instructions

Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Course Relationship


Course relationships
Course relationships:
Duke Integrative Health Coaching [nid:211]
Required
Require completion of this course for activity set completion.
On transcript
Show this course as a line item on the user's transcript.
On catalog
Show this course as a line item on the course catalog.
Certificate
User can download a certificate for this course.
Required
Require completion of this course for activity set completion.
On transcript
Show this course as a line item on the user's transcript.
On catalog
Show this course as a line item on the course catalog.
Certificate
User can download a certificate for this course.
Warning: Settings on this parent may override previously set configurations of the child course or child activity set.
Add another item
« Previous tab
Next tab »

Step-By-Step Instructions

Use this section to document step-by-step instructions.

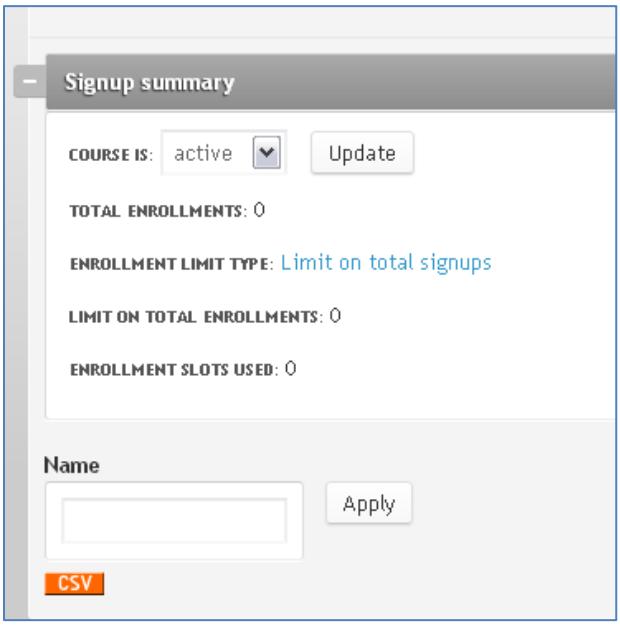
Notes

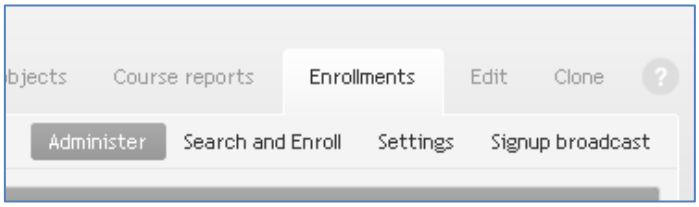
Use this section to capture personal notes and best practices.

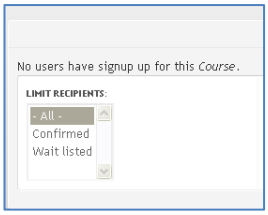
User Management

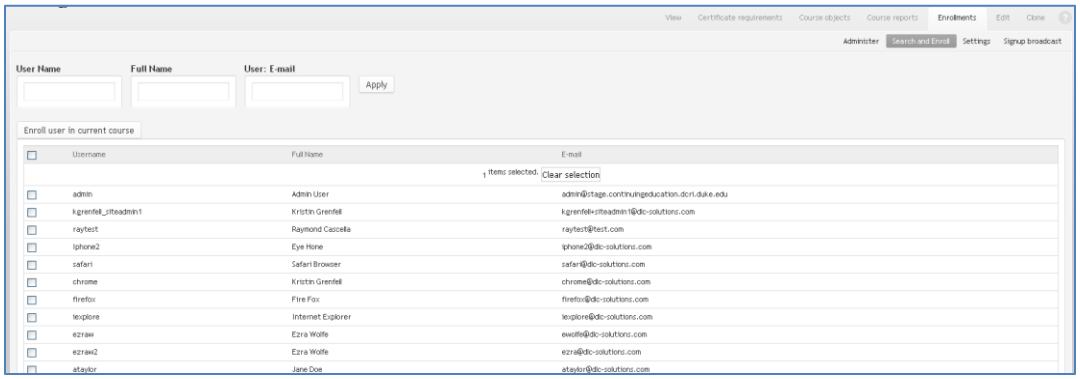
Enrolling and managing users in a course

[FOR MORE DETAILS SEE THE USER MANUAL PAGE 32 – 36]









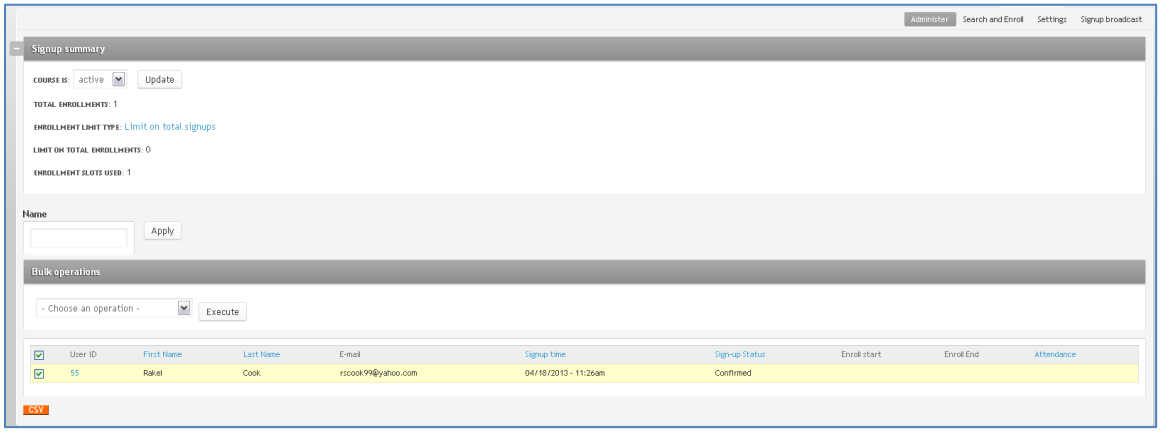
Step-By-Step Instructions

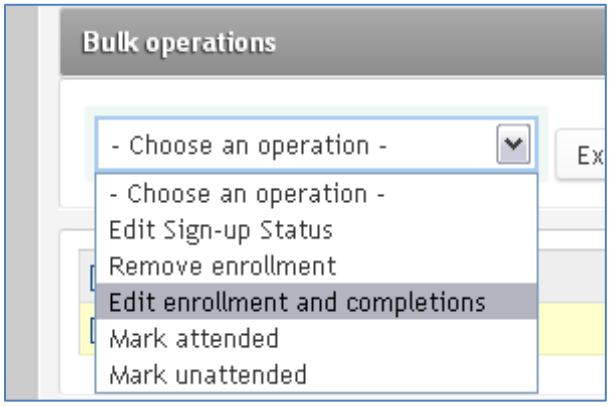
Use this section to document step-by-step instructions.

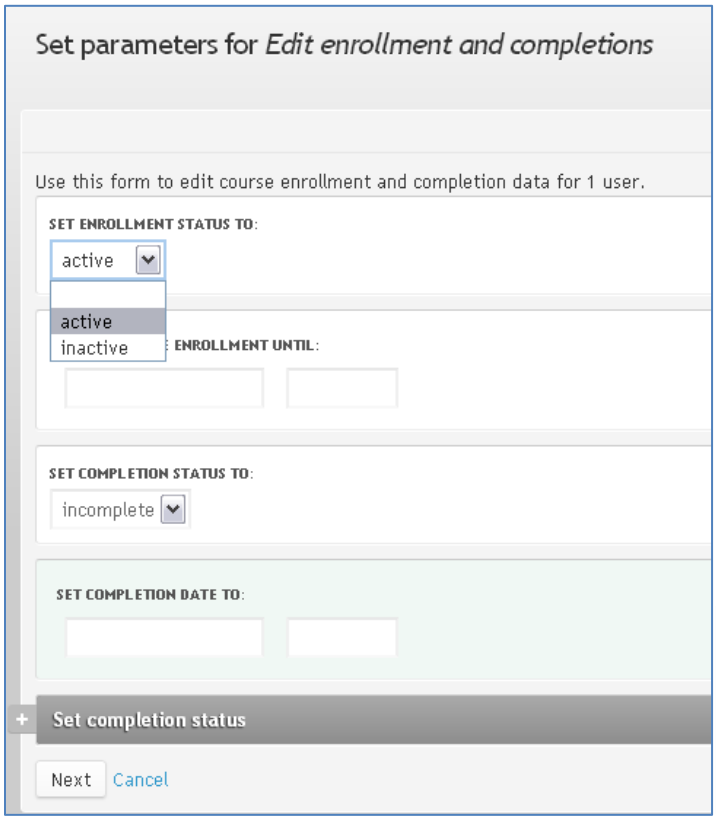
Notes

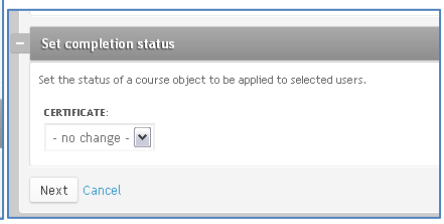
Use this section to capture personal notes and best practices.

Administer and Bulk Operation









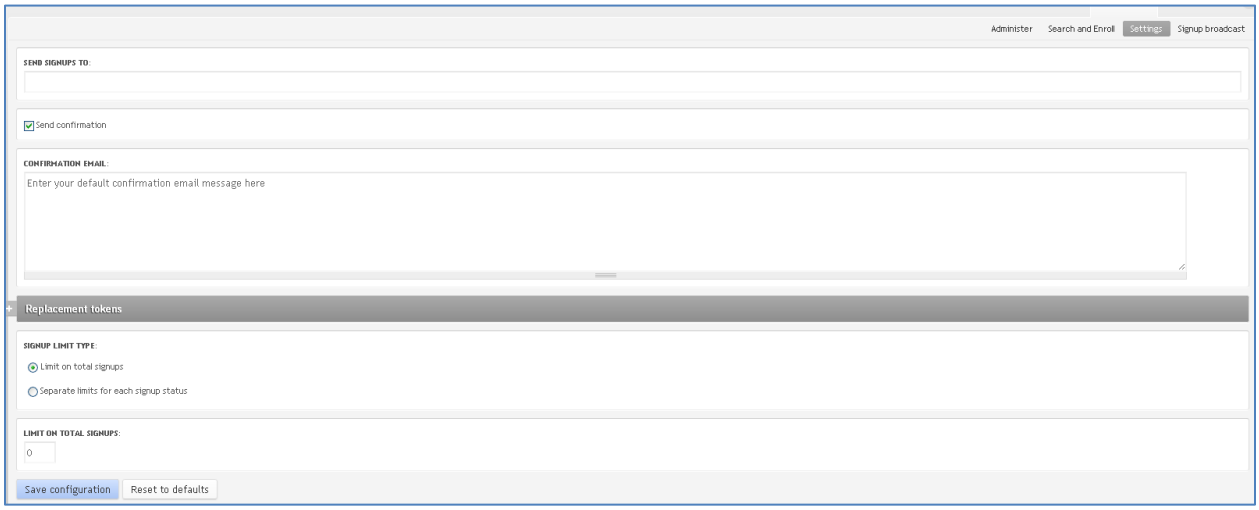
Step-By-Step Instructions

Use this section to document step-by-step instructions.

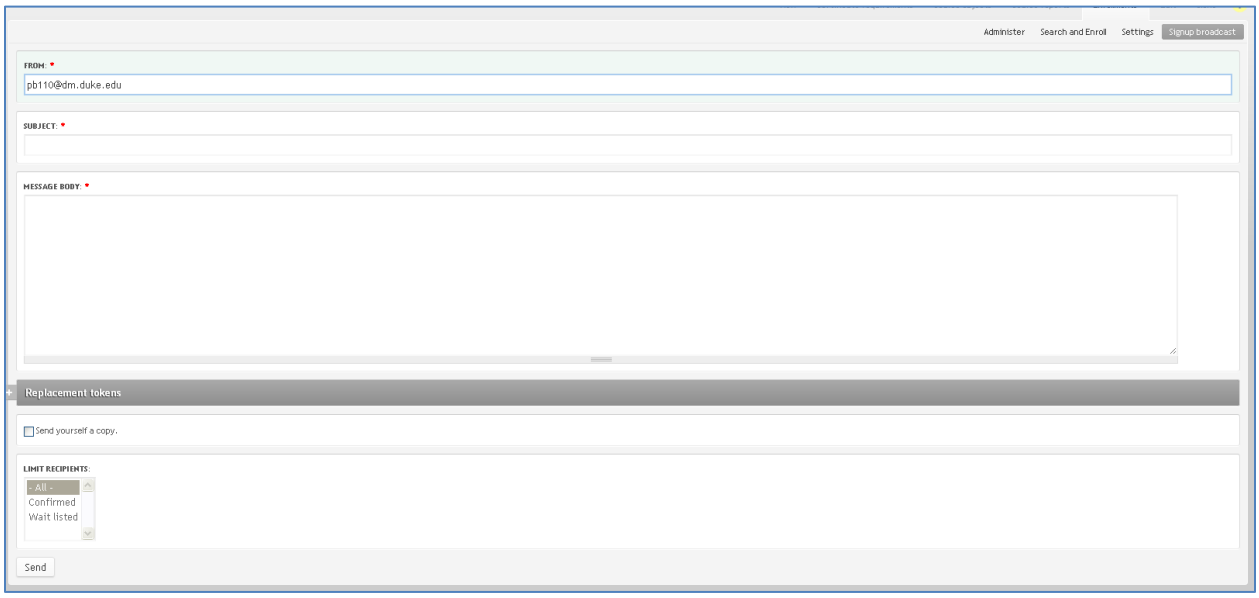
Notes

Use this section to capture personal notes and best practices.

Settings



Signup Broadcast



Step-By-Step Instructions

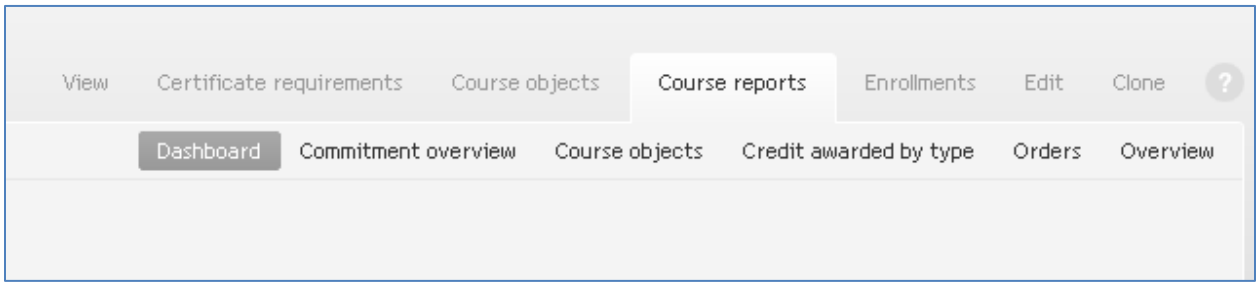
Use this section to document step-by-step instructions.

Notes

Use this section to capture personal notes and best practices.

Reports

Course specific reports



[FOR DETAILS ON REPORTS REFER USER MANUAL PAGE 93 – 102]